
PeopleSoft FSCM 9.2: Supply Planning

December 2020

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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the [Oracle Help Center](#). The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see [Configuring Context-Sensitive Help Using the Hosted Online Help Website](#).

Locally Installed Help

If you're setting up an on-premise PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. See [Configuring Context-Sensitive Help Using a Locally Installed Online Help Website](#).

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the [Oracle Help Center](#). The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals
- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

<i>Typographical Convention</i>	<i>Description</i>
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation

does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)
- E&G (Education and Government)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help
- Managing Hosted online help
- Managing locally installed PeopleSoft Online Help

PeopleSoft FSCM Related Links

[Oracle Help Center](#)

[Hosted Online Help](#)

[PeopleSoft Information Portal](#)

[My Oracle Support](#)

Financial and Supply Chain Management information for Search Framework search engine can be found in PeopleSoft Application Fundamentals documentation. For application specific information, see the "Understanding Search Pages within Components " (PeopleSoft FSCM 9.2: Application Fundamentals) topic.

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

[PeopleSoft Business Process Maps \(Microsoft Visio format\)](#)

[PeopleSoft Spotlight Series](#)

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Getting Started with PeopleSoft Supply Planning

Common Elements Used in Supply Planning

These elements are common to multiple pages in PeopleSoft Supply Planning.

As of Date

The last date for which a report or process includes data.

Business Unit

An identification code that represents a high-level organization of business information. Use a business unit to define regional or departmental units within a larger organization.

When populating this field on a search criteria page, select a value to include items associated with a specific business unit. Leave this field blank to include all of the business units associated with the problem instance.

Buying Agreement

A schedule between you and the customer defining terms and conditions. Buying agreements enable you to define beginning dates, ending dates, and maximum amounts; specify the minimum dollar value per order placed, as well as the maximum and minimum line item ordering quantities for each line item; define shipping defaults for all sales orders, as well as all products and product groups to be included; define special pricing terms for a customer or customer group; generate sales orders automatically when customers know in advance when products are needed; create sales orders in situations where shipment scheduling is unknown and create rebates and penalties.

Capacity Fence

Represents the date and time that solvers begin ignoring capacity violations. Solvers do not use plan for capacity or report-on capacity-type exceptions after the capacity fence.

The capacity fence should occur between the current time and the end of time. If you define the capacity fence as current time, solvers attempt no capacity smoothing. The default value for capacity fence is end of time.

Category

Category information helps to reduce redundant data entry during both item setup, requisition, and purchase order processing. The system assigns the purchasing attributes of an item category as defaults to any item in that category. Item categories can provide transaction information for requisitions,

requests for quotes, contracts, and purchase orders. Item categories also serve as the organizational unit for item catalogs; item catalogs are a collection of item categories. The system adds each item added to a category to each catalog that contains that category.

If the installation includes PeopleSoft Purchasing, you must create categories for the items. You are required to assign new items to a category on the Define Item - General: Common page.

When populating this field on a search criteria page, select a value to include only those items associated with a specific item category.

Configuration Code

A non-active field that is related to a deprecated product.

Customer Order

A general demand category to cover all of the customer demand transaction types, including sales orders, quotes, and buying agreements.

Current Date/Time

Each planning instance contains a base date and time known as current date and time. All of the other fences and horizons are specified as offsets to this base date. It is not related to the actual (or system date and time) except when the system date and time is used as a default for specifying the current date and time

Demand Date

Displays the requested or scheduled ship date and represents the date on which customer order demand is recognized. Solvers attempt to satisfy the demand on the selected date.

Demand Time Fence (Item Level)

Identifies the point in time that forecasts for an item are to be considered and consumed. Before this fence, only actual orders (and quotes) are considered as demand.

The demand time fence should be at or greater than current time

Description

Enter up to 30 characters of text.

Early Fence

This time fence represents the beginning time at which solvers can actively change the supply plan to make it material- and capacity-feasible. Usually, you set the early fence to the first date that you can accommodate changes in the supply plan.

Before the early fence, solvers cannot:

- Create any new supply with a start time before the early fence.
- Reschedule current tasks that have a start time before the early fence.
- Reschedule existing tasks starting after the early fence to start before the early fence.

- Cancel current tasks that have a start time before the early fence.

The early fence must occur between the start of time and the end of time.

Effective Date

Date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information.

Pages and batch processes that use the information, use the current row.

End of Time (End Fence)

This fence represents the concluding time boundary. PeopleSoft Supply Planning solvers do not recognize orders or changes after this date.

The end date and time fence must occur at or after the current date and time.

Family

In PeopleSoft Inventory, you can categorize items by groups and families. No formal relationship exists between item groups and item families, but you can use an item family to further classify an item group. For example, you can further define the hardware group as consisting of families of fresh-water equipment and salt-water equipment.

When populating this field on a search criteria page, select a value to include only those items associated with a specific item family.

Forecast Fulfillment Fence

If a solver cannot fulfill a forecast demand before this fence, it ignores the forecast demand. The forecast fulfillment fence must exist after the start of time and at or before the end of time. The default value is the current date

Forecast Source

Specify the data source for item forecasts. If the data source is the inventory system, you must also specify a forecast set. If the forecast data originated in Demantra Demand Management, you must also specify the name and date of a published forecast contained in PeopleSoft Publish Forecast tables. These tables are available in the Advanced Planning component.

Include Quantity

Select to include the order in all of the planning functions. The system populates this field by default. This option enables you to load an order in PeopleSoft Supply Planning and ignore the order during simulations.

If you do not select this option, the order appears on the corresponding maintenance page only; the order does not appear on workbenches or reports and is ignored by solvers.

Item Group

A grouping of items that enable you to design the accounting structure for a group of similar items, such as sporting

equipment or dress shoes. The item group is attached to an item using the Item Definition - General page.

When populating this field on a search criteria page, select a value to include only those items associated with a specific item group.

Item ID

Represents the unique identifier that the system uses to track and retrieve an item.

When populating this field on a search criteria page, select a value to include only the item specified. If you do not enter a value in this field on a search criteria page, the system includes all of the items in the business unit that meet the specified search criteria.

Late Fence

Used as a reporting fence. PeopleSoft Supply Planning does not consider exceptions that occur after the late fence in any metrics used to analyze plan quality. The late fence must occur after the early fence and at or before the end of time. The default value for late fence is end of time.

Note: All of the solvers net supply and demand and create new supplies through the end of time fence.

Once, Always, and Don't Run

Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.

Select Always to run the request every time the batch process runs.

Select Don't Run to ignore the request when the batch process runs.

Planned By

Indicate whether you want the system to include items or exceptions that have been defined in either the material plan, master plan, distribution plan, or any combination. When processing requests, the system includes only those items or exceptions associated with the specified planned-by types.

Planner Code

Represents the name of a specific planner. Use planner codes to provide access to information more efficiently and filter information in most pages and processes.

When populating this field on a search criteria page, select a value to include only those items associated with a specific planner.

Planning Instance ID

Represents a complete set of data within the PeopleSoft Optimization framework. You define planning instance IDs on the Planning Instance Definition page.

The system uses planning instance default values on any page where the field is available for entry. The system uses the value that you defined for the planning instance on the User Preferences - Planning page. Otherwise, it uses the value that you defined on the Installation Options - Planning page.

See [Creating Planning Instance Definitions](#).

Plan Unit Group

Select the plan unit group that you want to associate with the planning instance. You define business unit groups on the Business Unit Group Definition page. A business unit group represents all of the business units that you want to include in a planning instance. This field is required.

See [Setting Up Business Unit Groups](#).

Process Monitor

Click to access the Process List page, where you can view the status of submitted process requests.

Quantity On Hand Date/Time

Represents the date and time for which the item and business unit quantity on-hand values are calculated. This value is often equal to the system date and time when you ran the Load Planning Instance process (PL_LOAD_OPT).

While the system calculates the quantity on hand date for each item in a sequential order, it applies the same quantity on hand date to all of the items. The system considers all of the orders before this date and time are past due.

Report Manager

Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

Request ID

An ID that represents a set of selection criteria for a report or process.

Round Component Demand

Select to round a component demand. This option overrides the component rounding option on the item master. Use this option to prevent the accumulation of rounding errors.

Maintain this option at the business unit level.

Run

Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.

Run Lateness/Stock Phase

The Feasible solver performs an exhaustive search to determine all of the possible methods to source the end item and meet the end demand on time. The Feasible solver lateness repair considers late demands in priority order, working on intolerably late orders first. The solver attempts to meet the demand on time. If it cannot, it attempts to meet the demand as close as

possible to the due date; failing that, the solver attempts to reduce the lateness of the order as much as possible.

The Feasible solver stock adjustment phase attempts to reduce temporary excess by scheduling supplies just in time for their demands while maintaining capacity. In addition, it attempts to restore any missed safety stock periods by scheduling late any demands that are a lower priority than safety stock.

SetID

An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a SetID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that SetID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same SetID for that record group.

Short Description

Enter up to 15 characters of text.

Start of Time (Start Fence)

This time fence represents the beginning time boundary, before which time does not exist. Used with the end of time, the region defines the time period within which the system recognizes orders and changes. PeopleSoft Supply Planning solvers do not recognize orders and changes before start of time.

Define the start of time fence far enough in the past to ensure that the start date for all in-process production orders are included.

User ID

An ID that represents the person who generates a transaction.

Utilization Type

Classifies inventory items based on their demand and usage.

When populating this field on a search criteria page, select a value to include only those items associated with a specific item utilization type.

Vendor Location

Select a vendor location. When purchasing items from a vendor who has multiple locations, you can, for example, select a location with the shortest lead time.

Request ID

Enter a request identification to represent the set of selection criteria for this process.

Related Product Documentation

Oracle's *PeopleSoft Supply Planning documentation* provides you with implementation and processing information for Oracle's PeopleSoft Supply Chain Management system. However, additional, essential

information describing the setup and design of the system resides in companion documentation, Oracle's *PeopleSoft Application Fundamentals documentation*. The companion documentation consists of important topics that apply to many or all of Oracle's PeopleSoft applications across the PeopleSoft Financials, Enterprise Service Automation, and Supply Chain Management product lines. You should be familiar with the contents of this documentation.

PeopleSoft Supply Planning Overview

PeopleSoft Supply Planning offers advanced planning and scheduling systems that use Web-based access to provide simultaneous responsiveness and optimization of enterprise-wide procurement, distribution, and production resources. PeopleSoft Supply Planning is made up of planning systems that streamline the enterprise's responsiveness to customers and maximizes decision support for the planners.

These robust applications are integrated, manufacturing and distribution planning solutions that reduce planning cycle time and enable the enterprise to respond to supply changes using a browser-based user interface.

These application's interface structures make it easy for you to follow a logical business process flow. PeopleSoft Supply Planning consists of rich functionality that simplifies, automates, and augments the business processes and data flow to provide a comprehensive supply chain planning solution.

PeopleSoft Supply Planning Business Processes

Provided is a list of the PeopleSoft Supply Planning business processes:

- Create supply plan.
- Solve the supply plan.
- Interact with and refine the supply plan.
- Commit supply plan.

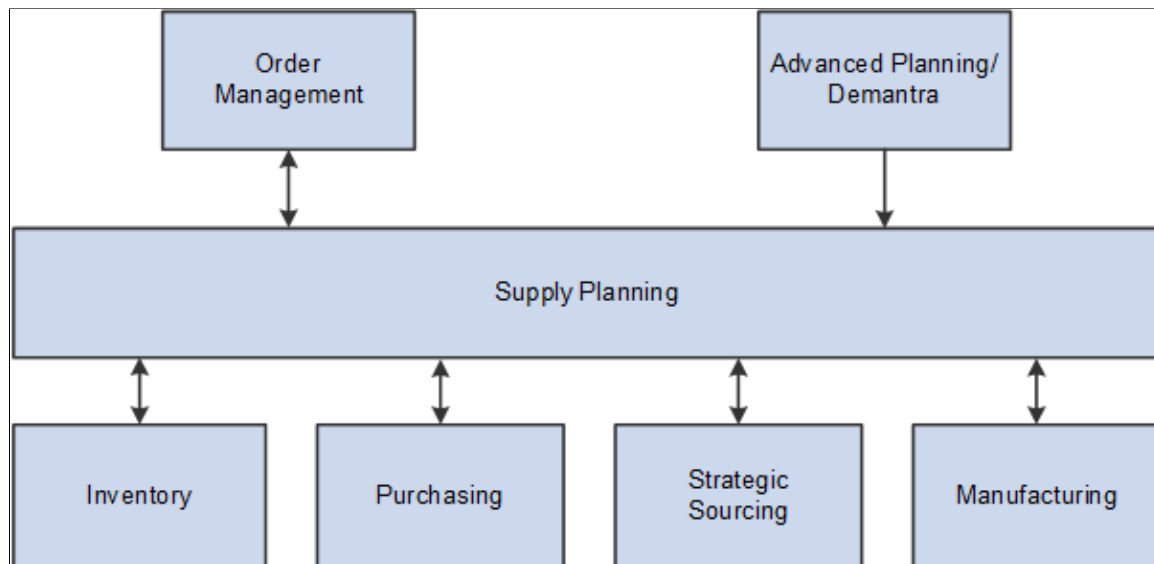
These business processes are discussed in the business process topics in this Supply Planning product documentation.

PeopleSoft Supply Planning Integrations

PeopleSoft Supply Planning integrates with these PeopleSoft applications and components:

Image: PeopleSoft Supply Planning Integration with Other PeopleSoft Applications

This diagram illustrates how PeopleSoft Supply Planning integrates with these PeopleSoft applications and components.



PeopleSoft Supply Planning integrates with these PeopleSoft Supply Chain Management applications:

- *Advanced Planning/Demantra:* Oracle's Demantra Demand Management provides forecasts in PeopleSoft Publish Forecast tables that are available in SCM Integration's Advanced Planning component. PeopleSoft Supply Planning uses the forecasts to create a plan. You must specify the name and date of a published forecast.

See "Understanding Demantra Integration" (PeopleSoft FSCM 9.2: Supply Chain Management Integration)

- *PeopleSoft Order Management:*
 - If you maintain forecasts at the product level in PeopleSoft Order Management, the system sends the product forecast to PeopleSoft Supply Planning.
 - PeopleSoft Order Management sends demand (sales orders, quotations and buying agreements) to PeopleSoft Supply Planning.
 - If PeopleSoft Supply Planning changes a sales order, quotation or buying agreement, it sends a planning update to PeopleSoft Order Management. You must manually update the sales order, quotation or buying agreement in PeopleSoft Order Management.
- *PeopleSoft Purchasing:*
 - PeopleSoft Purchasing sends purchase orders, which are a source of supply in PeopleSoft Supply Planning.
 - After creating a plan, PeopleSoft Supply Planning sends planning updates for rescheduled purchase orders and planned purchase orders to PeopleSoft Purchasing. You can review and approve the updates before applying the updates to the database.

- *PeopleSoft Manufacturing:*
 - PeopleSoft Manufacturing sends bill of materials (BOMs), item routings, and resources to PeopleSoft Supply Planning.
 - PeopleSoft Manufacturing sends production orders, which are a source of supply in PeopleSoft Supply Planning.
 - After creating a plan, PeopleSoft Supply Planning sends planning updates for rescheduled production orders and planned production orders to PeopleSoft Manufacturing. You can review and approve the updates before applying the updates to the database.
- *PeopleSoft Inventory:*
 - If you maintain forecasts at the item level in PeopleSoft Inventory, the system sends the product forecast to PeopleSoft Supply Planning.
 - PeopleSoft Inventory sends item information and inventory levels to PeopleSoft Supply Planning.
 - PeopleSoft Inventory sends material stock requests and transfer orders to PeopleSoft Supply Planning.
 - After creating a plan, PeopleSoft Supply Planning sends planning updates for rescheduled stock requests, rescheduled transfer orders and planned transfer orders to PeopleSoft Inventory. You can review and approve the updates before applying the updates to the database.
- *PeopleSoft Strategic Sourcing:* PeopleSoft Supply Planning sends material requirements for spot buy items to PeopleSoft Strategic Sourcing. Then, you can accept competitive bidding for these items.

Detailed integration considerations are covered in the implementation topics in the Supply Planning documentation.

PeopleSoft Supply Planning Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for the organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding documentation.

Other Sources of Information

In the planning phase of the implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft Application Fundamentals*, with information about where to find the most current version of each.

See "PeopleSoft Application Fundamentals Overview" (PeopleSoft FSCM 9.2: Application Fundamentals)

Chapter 2

Setting Up PeopleSoft Supply Planning

Understanding Model Controls for Supply Planning

When you set up attributes for PeopleSoft Supply Planning, you define attributes that control the planning models that are used by PeopleSoft Supply Planning as well as by other applications within PeopleSoft Supply Chain Management. These topics describe the key setup pages and components and describes how they affect PeopleSoft Supply Planning.

Time Fences

To reduce the size of a planning problem to a manageable set of data and functionality, use regions of time to define the scope of the plan. These regions of time are bounded by fences, which define the start and finish of these regions and influence solvers.

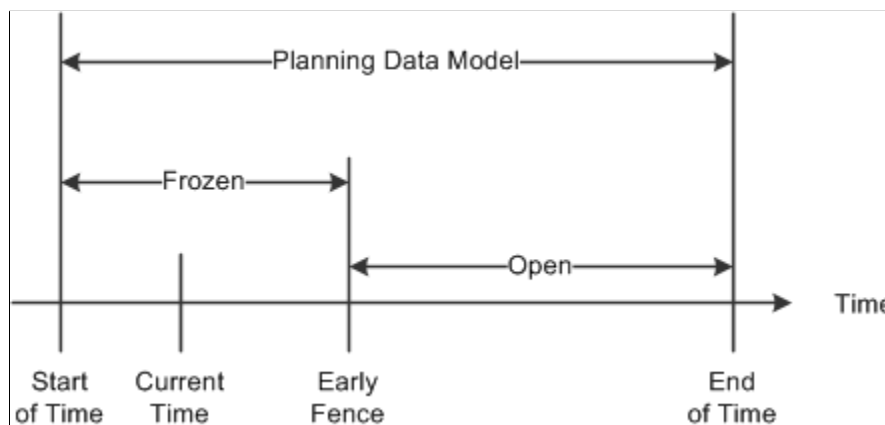
PeopleSoft Supply Planning automated processes, such as the Load Planning Instance process (PL_LOAD_OPT) and solver runs, use fences in the planning system to place boundaries on the magnitude of the planning problem, restrict the behavior of the solvers during certain time periods, and automate certain conditions at certain times. Manual processes, such as reschedules, are not constrained by fences (manual processes are, however, constrained by the start of time and the end of time fences).

Fences are attributes of a planning model, which you often define when running the Load Planning Instance process (usually by defining an offset time from a base time associated with a plan). The base time is equivalent to the current date time. Unless otherwise specified, offsets are defined in units of days.

This diagram illustrates the most common fences that are used in PeopleSoft Supply Planning, including time fences for use with frozen and open planning times:

Image: PeopleSoft planning time fences

This diagram illustrates the most common fences that are used in PeopleSoft Supply Planning, including time fences for use with frozen and open planning times.



The Planning Region

The region of time that is bounded by the Start of Time fence and the End of Time fence is the planning region. When you load an order into PeopleSoft Supply Planning from the transaction database, it may fall into this region if these options are true for:

Sales Order Schedule Line

When running the Load Planning Instance process, you have an option to use either the request date or the schedule date as the target demand date in PeopleSoft Supply Planning. This option for sales orders determines which date the Load Planning Instance process uses for sales order inclusion in a plan. The specified date (dependent on the global option setting) must be in the planning region. The Load Planning Instance process selects all associated line and header information within the planning region.

Transaction System Forecasts

PeopleSoft Supply Planning considers forecast that is entered into the transaction system as a forecast quantity at a point in time. Generally, the forecast date time occurs in the planning region. However, the demand fence must be at or after the current time if the solver is to consider the forecast for inclusion in a plan. The Load Planning Instance process loads only those forecasts that can be used by the planning solvers. Demand fences are defined for each item within a business unit.

Published Forecasts

Forecasts values are produced by Demantra Demand Management. This forecast data is provided to PeopleSoft Publish Forecast tables that are available in the Advanced Planning component. You specify the name and date of a published forecast for use in Supply Planning.

You can also import published forecasts from a third-party demand planning application. Published forecasts are bucketed (period) forecasts. Generally, the bucketed forecast date time occurs in the planning region. However, the demand fence must be at or after the current time if the solver is to consider the forecast for inclusion in a plan. The Load Planning Instance process loads only those forecasts that can be used by the planning solvers.

See "Understanding Demantra Integration" (PeopleSoft FSCM 9.2: Supply Chain Management Integration)

Interunit Transfer

If you include the source business unit in the planning instance, then the scheduled ship date exists in the planning region. If you include the destination business unit in the planning instance, then the scheduled arrival date exists in the planning region. These rules also apply to any planned interunit transfers.

Material Stock Request

The schedule ship date exists in the planning region. This rule also applies to any planned transfers.

Purchase Order Line

The scheduled arrival date exists in the planning region.

Production Order

The scheduled start and end dates must exist in the planning region. PeopleSoft Supply Planning assumes that any component demands that are associated with the production order occur between the production order start and finish dates.

Prerequisites

Before you set up planning data, you must set up PeopleSoft Supply Planning installation options, user preferences, and general option settings on these PeopleSoft Supply Planning-related pages:

- Installation Options.

Set up installation options in the PeopleSoft Supply Chain Management (SCM) database.

- Define Planning Attributes - Installation Options. Select the default planning instance, display template, order key separator, and starting sequence numbers for planned production, planned purchases, and planned transfers that are being committed from the planning instance.

see "PeopleSoft Application Fundamentals Overview" (PeopleSoft FSCM 9.2: Application Fundamentals)

Setting Up Sourcing Templates

To set up sourcing templates, use the Sourcing Template component (PL_SRC_TEMPLATE).

Sourcing demand is the process that the PeopleSoft Supply Planning system uses to determine how the supply for an item's demand is going to be filled. The system sources demand using sourcing options. These options define parameters for manufacturing, purchasing, or transferring an item to meet demand. You define these options when you set up an item.

This topic provides an overview of sourcing templates, lists common elements, and discusses how to set up sourcing templates.

Pages Used to Set Up Sourcing Templates

Page Name	Definition Name	Usage
<u>Define Sourcing Templates Page</u>	PL_SRC_TEMPLATE	Create sourcing templates. Identifies sourcing details including production, purchasing, and transfer options for sourcing templates.
Define Sourcing Templates - Update Production Page	PL_SRC_PROD_SP	Identify production options to be considered when creating planned production for the item. <u>Define Sourcing Templates Page</u>

Page Name	Definition Name	Usage
<u>Define Sourcing Templates - Update Transfers Page</u>	PL_SRC_TRANS_SP	Identify transfer options to be considered when creating planned transfers for the item.
<u>Define Sourcing Templates - Update Purchase Page</u>	PL_SRC_PURCH_SP	Identify purchase options to be considered when creating planned purchases for the item.
<u>Generate Sourcing Templates - Generate Templates Page</u>	PL_GEN_TMPL_REQ1	Generate sourcing templates. The Create Sourcing Templates process loads production, transfer, and purchasing options automatically into a sourcing template for one business unit group at a time. You can create and maintain a sourcing template for all of or for a range of items.
Review Sourcing Information - Sourcing Template	PL_SOURCE_DTL	Review sourcing options for an item such as priority, default, and details options.
Review Sourcing Information - Production Options	PL_PROD_DTL	Review detailed production sourcing information about the item.
Review Sourcing Information - Purchase Options	PL_PURCH_DTL1	Review detailed purchasing sourcing information about the item.
Review Sourcing Information - Transfer Options	PL_TRANS_DTL1	Review detailed transfer sourcing information about the item.

Understanding Sourcing Templates

A sourcing template contains a sequenced list of sourcing options (purchase, transfer, or production) based on the item attributes that are defined in PeopleSoft Purchasing, PeopleSoft Inventory, and PeopleSoft Manufacturing. You can let the system load the options automatically, or you can set up sourcing templates manually and maintain the options. These templates are needed when multiple sourcing options exist for an item.

When you assign multiple sourcing options to a single item, you create a more flexible planning situation by providing more information to source demand. Material availability, resource capacity, and lead time can create exceptions that influence the sourcing selection. When you provide several options, the system has more opportunities to find an option that resolves an exception. For example, if a purchase option does not have adequate lead time, PeopleSoft Supply Planning can go to the next prioritized option to determine whether it can use that option to meet the demand.

The Define Sourcing Templates page enables you to review sourcing options before creating a plan, reduce processing time, and prevent the Create Sourcing Templates batch process job from overwriting those templates that you want to maintain manually.

The system uses these sourcing options to create supply to meet demand for an item:

Production Option

Defines the method that you use to produce an item (for example, the material and resources that are required to make

a specific item). These options combine a BOM and routing code that can be effective-dated for seasonal mix variations and that originate from item maintenance settings at the business unit level. You can create a production option for each BOM and routing code combination. You can define the BOM code, the routing code, and production option usage at the business unit level. You can also maintain options for an item when the planning rates are not maintained at the routing level.

Note: Production options are based on the definitions that exist for the BOM, routing, or item. If you change or add a new BOM, routing, or item attribute (lead-time usage or production control attributes, for example) you might need to regenerate the sourcing template to ensure that solvers make proper sourcing decisions.

Transfer Option

Defines transfer attributes, such as cost or transfer time, that are associated with transferring an item from one business unit to another. Create the option by defining transfer attributes for an item.

You can define transfer options at the business unit level or at the item level. Items with a planned-by option defined as *Distribution* use the business unit transfer option if the item does not have a specific item-based transfer option.

Note: Transfer options are based on the default transfer attributes for a business unit or the item transfer attributes. If you change or add a new transfer attribute, you might need to regenerate the sourcing template to ensure that solvers make proper sourcing decisions.

Purchase Option

Defines item and supplier attributes, such as cost, lead time, and order modifiers. You create the option by defining item and supplier relationships on the Item Purchasing Attributes page.

Note: Purchase options are based on the purchase item attributes. If you change or add a new purchase item attribute, you might need to regenerate the sourcing template to ensure that solvers make proper sourcing decisions.

Manually Creating and Loading Sourcing Templates

When you manually create a sourcing template on the Define Sourcing Templates page, you sequence the options and define a default option for use if the system cannot find an adequate option using prioritization. The system uses fixed-priority sourcing logic to determine which sourcing option to use to meet the demand, evaluating, in the order of priority, each sourcing option until an option meets all of the selection criteria.

The system evaluates several criteria to determine when to select a sourcing option. First, the sourcing option must be valid. For example, if effectivity dates apply to the option, the option must be effective.

Note: Effective dates apply only to production options in the Planning Instance tables.

The system also considers material and capacity availability when selecting sourcing options. If you specify material availability as a criterion, then all materials (consumed by the tasks of that routing) must exist at the time they are required. If you specify capacity as a criterion, then all aggregate resources (that are consumed by the tasks of that routing) must have available capacity at the time they are required. PeopleSoft Supply Planning considers material as a sourcing criteria.

If the system evaluates all of the sourcing options and no options meet the selection criteria, it uses the default option (identified by the PL_SRC_DEFAULT column in the PL_SRC_TMPL_INF component).

Generating Sourcing Templates Automatically

Use the Generate Sourcing Templates - Generate Templates page to load production, transfer, and purchasing options automatically into the sourcing template for one business unit group at a time. The priority of each option is based on lowest cost. After you load the sourcing options into the template, you can maintain the priorities and the default option manually.

Reviewing and Refining Sourcing Information

You can review an item's sourcing template and sourcing options by using the Review Sourcing Information inquiry component. This component displays the sourcing template for the item and the data from production, purchasing, and transfer options. Use these inquiry pages to review sourcing options to be sent to the planning engine.

Along with maintaining sourcing information at the planning-instance level, you can update the business unit sourcing template with the current planning instance sourcing template. A check box displays the setting of the Manually Maintained check box for the Business Unit sourcing template, which you can change. If you select the check box, the changes to the business unit sourcing template will not be overwritten the next time that you run the Generate Sourcing Template process.

Common Elements Used in This Section

Apply Selected

Select this check box on the Update Production page, the Update Transfer page, or the Update Purchase page and click OK to identify the option or options that you want to load when you return to the Define Sourcing Templates page.

Associated BOM (associated bills of material)

Displays the assigned primary items BOM that is used when you are generating supply for a co-product. When an item is a co-product on multiple primary BOMs, one of the primary items must be assigned as an associated primary BOM. If an item has an associated primary item that is different from itself and also has its own BOM, then the planning instance imports production options for both the item itself and the associated primary item.

BOM (bills of material)

Displays the BOM identifier for the production option within the template. Production options can be predefined or created based on defaults that are specified at the item attributes by unit level.

Location	Select a supplier location. When purchasing items from a supplier who has multiple locations, you can, for example, select a location with the shortest lead time.
Min Order Qty (minimum order quantity)	Displays the minimum quantity that can be placed on a production, transfer, or purchase order.
Max Order Qty (maximum order quantity)	Displays the maximum quantity that can be placed on a production, transfer, or purchase order.
Order Multiple	Displays the multiple that the system uses to determine an order quantity. For example, if you have a demand for 28 and the multiple is 10, then the system generates a planned purchase order for 30.
<hr/> Note: Minimum and maximum order quantities must be in multiples of the order multiple if you specify an order multiple.	
Routing	Displays the routing identifier for the production option within the template. The system populates this column only when routings are being used.
Ship VIA	Identifies the method that is used for shipping the item.
Source BU (source business unit)	Identifies the business unit that is shipping the item.
Unit Cost	Displays the cost to produce a single unit of the item that is defined in the sourcing template. When generating sourcing templates automatically, the system uses the cost as the basis for prioritizing sourcing. A lower item cost corresponds to a higher sourcing priority.
Supplier	Identifies a specific supplier, as defined on an item or supplier definition in PeopleSoft Purchasing.
Supplier SetID	Displays the SetID in which the supplier information was defined in PeopleSoft Purchasing.

Define Sourcing Templates Page

Use the Define Sourcing Templates page (PL_SRC_TEMPLATE) to create sourcing templates.

Identifies sourcing details including production, purchasing, and transfer options for sourcing templates.

Navigation

Supply Planning > Define Planning Attributes > Sourcing Templates > Define Sourcing Templates

Image: Define Sourcing Template page

This example illustrates the fields and controls on the Define Sourcing Template page. You can find definitions for the fields and controls later on this page.

Define Sourcing Templates

Business Unit US001 Std UOM EA

Item ID LT5010 Custom Road Bicycle

☐ Manually Maintained

Refresh Current Template Delete Current Template

Sourcing Template Personalize | Find | View All | First 1-2 of 2 Last

Default	*Priority	Option Type	Unit Cost	Minimum Quantity	Maximum Quantity
<input checked="" type="checkbox"/>	10	Purchase	998.9800		
<input type="checkbox"/>	20	Purchase	998.9800		

Go to: Update Production Update Transfer Update Purchase

Save Notify Add Update/Display

Manually Maintained

Select to identify this sourcing template as a manually maintained template. If you select this check box, the Generate Sourcing Template batch job does not overwrite any options in the template.

If you no longer need to maintain this sourcing template manually, deselect this check box. The next time that you run the Generate Sourcing Template batch job, the system overwrites the current sourcing template, including the options that you have defined.

Refresh Current Template

Click to replace the existing sourcing options with the current available default sourcing options. When prompted, click Yes to refresh with the current sourcing options; click No to keep the sourcing options as they appear on the page.

Update Production

Click to access the Update Production page, where you can select production options for the item.

Update Transfer

Click to access the Update Transfers page, where you can select transfer options for the item.

Update Purchase

Click to access the Update Purchase page, where you can select purchase options for the item.

Sourcing

Select the Sourcing tab to view and maintain basic information about the sourcing template.

Default

Select to use this sourcing option as the default value when the planning engine sources demand for the current plan. You can select only one sourcing option as the default for the template.

The system uses the default option to source demand when no sourcing template entries meet the selection criteria.

Priority

Enter a numerical value that defines the priority that you want the planning engine to consider when using a sourcing option to meet demand. You can enter any positive number up to 999. The planning engine (solver dependant) considers all of the sourcing template options (production, transfer, and purchase) using their priority in ascending sequence until it finds a template that can meet the demand without creating planning exceptions. If the planning solvers cannot find a template without exceptions, then it uses the default template.

Option Type

Defines whether the demand is supplied by production, purchase, or transfer.

Minimum Quantity

Defines the minimum demand quantity that should be considered when selecting this sourcing option. For example, if the demand is 10 but the minimum quantity is 50, then the sourcing option will not be considered when generating supply.

Maximum Quantity

Defines the maximum demand quantity that should be considered when selecting this sourcing option. For example, if the demand is 100 but the maximum quantity is 80, then the sourcing option will not be considered when generating supply.

Production

Select the Production tab to view and update information related to bills of material.

Purchase

Select the Purchase tab to view and update information related to purchasing and suppliers.

Transfer

Select the Transfer tab to view and update information related to material transfers.

Define Sourcing Templates - Update Transfers Page

Use the Define Sourcing Templates - Update Transfers page (PL_SRC_TRANS_SP) to identify transfer options to be considered when creating planned transfers for the item.

Navigation

Click Update Transfers on the Define Sourcing Templates page.

Transfer Yield

Defines the usable output from the transfer. The value is expressed as a percentage. The transfer yield is used in PeopleSoft Supply Planning to inflate the planned quantity on transfers to account for any loss that occurs during transport.

Define Sourcing Templates - Update Purchase Page

Use the Define Sourcing Templates - Update Purchase page (PL_SRC_PURCH_SP) to identify purchase options to be considered when creating planned purchases for the item.

Navigation

Click Update Purchase on the Define Sourcing Templates page.

Supplier Details Tab

Select the Supplier Details tab.

Standard Price

Displays the standard price for the item. The system uses this value as the default price in transactions for which another price, such as a supplier price or a contract price, is not defined for the item.

Lead Time Days

Displays the purchasing lead time that is specified for the supplier or item or supplier relationship. This value represents the amount of time that is required to get inventory from the supplier.

Order Modifiers Tab

Select the Order Modifiers tab.

Purchase Yield

Defines the usable output from the purchase. The value is expressed as a percentage. Purchase yield is used in planning to inflate the planned quantity on purchases to account for any loss that may occur during the purchase process.

Generate Sourcing Templates - Generate Templates Page

Use the Generate Sourcing Templates - Generate Templates page (PL_GEN_TMPL_REQ1) to generate sourcing templates.

The Create Sourcing Templates process loads production, transfer, and purchasing options automatically into a sourcing template for one business unit group at a time. You can create and maintain a sourcing template for all of or for a range of items.

Navigation

Supply Planning > Define Planning Attributes > Sourcing Templates > Generate Sourcing Templates

Sourcing Options

Identifies options to update and include in the sourcing templates that are being generated. You can select all options or any combination of options, but you must select at least one option. Options that are not selected remain in any currently existing templates. For example, if you select the Purchase Options check box only, then transfer and production options remain unchanged in any template that they belong to when the templates are refreshed. The system refreshes purchase options for the items that you select in the Item Option group box. These sourcing options are available:

Purchase Options

Select to include purchase options, which define item and supplier attributes such as cost, lead time, and order modifiers. You create the option by defining item and supplier relationships in the PeopleSoft Supply Chain Management database on the Define Items and Attributes - Purchasing Attributes component.

Production Options

Select to include production options, which include a combination of a BOM and routing code that can be effective-dated for seasonal mix variations. The option defines which materials and resources are required to make a specific item.

Transfer Options

Select to include transfer options, which define transfer attributes such as cost or transfer time, that are associated with transferring an item from one business unit to another. You create the option by defining transfer attributes for an item.

Item Option

Define which items you want to include in Create Sourcing Template processing. Options are:

All

Select to include all items with defined sourcing options in the processing. This is the default option.

Range

Select to specify a range of items to be included in the processing. Use the adjacent fields to define a from and to item ID range. These adjacent fields are required if you select the Range option. The system creates sourcing options for those items that are within the range only.

Only New Items

Select to include only those items that have been established since the last sourcing template was created. When you select this field, the Date Added field becomes available for entry, where you must enter a date from which you want the system to consider new items.

Date Added

Enter the date from which you want the system to consider new items. The system generates sourcing templates for any items that were established after this date. This is a required field if you select Only New Items.

Run

Click to run the Generate Sourcing Templates process (PLS5000). PeopleSoft Process Scheduler runs the process at user-defined intervals.

Defining PeopleSoft Supply Planning User Preferences

This topic discusses how to assign user preferences.

Page Used to Define PeopleSoft Supply Planning User Preferences

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>User Preferences Page</u>	OPR_DEF_TABLE_SPL	Assign default user preferences for PeopleSoft Supply Planning.

User Preferences Page

Use the User Preferences page (OPR_DEF_TABLE_SPL) to assign default user preferences for PeopleSoft Supply Planning.

Navigation

Supply Planning > Define Planning Attributes > User Preferences

Default Planning Instance	Select a default planning instance for the corresponding user ID.
Default Display Template	Select a default display template for the corresponding user ID.
Order Key Separator	Select a default key separator for the corresponding user ID. The system uses order key separators to format the display for a single field that contains a line, schedule, and kit number for sales orders and quotes in PeopleSoft Supply Planning grids.

Creating Planning BOMs

To create planning BOMs, use the Planning BOM Maintenance component.

This topic provides an overview of planning BOMs and discusses how to define planning BOMs.

Page Used to Define Planning Bills of Material

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Planning BOMs Page</u>	PL_BOM_MAINT	Create and maintain components that make up a planning BOM for a group of assembly items or product families.

Understanding Planning BOMs

A planning BOM is an artificial grouping of related items that you can use to forecast demand. Using a planning BOM, you can facilitate the master scheduling and material planning processes by reducing the number of items that the planner needs to forecast.

On the Planning BOMs page, you can create and maintain at the summary level all components that make up a planning BOM for a group of assembly items or product families in a specific business unit.

Note: To define an item for use as the parent ID on a planning BOM, you must define the item as a planning item. To define an item as a planning item, you must select *Planning* in the Source Code field on the Define Business Unit Item - Manufacturing: General page.

You can also use a planning BOM to split the forecast among multiple items. For example, you might forecast item SR1001 at 50 percent of the forecast, item SR1002 at 30 percent, and item SR1003 at 20 percent.

Planning BOMs Page

Use the Planning BOMs page (PL_BOM_MAINT) to create and maintain components that make up a planning BOM for a group of assembly items or product families.

Navigation

Supply Planning > Define Planning Attributes > Planning Bills of Material

BOM Quantity (bill of material quantity)	The BOM quantity acts as a scaling device that enables you to enter a structure when the planning item's specifications are in a base that is greater than 1 unit.
Component ID	Select the name of the component to use in the planning BOM. The component can be a planning item.
Effective Date and Obsolete Date	Define the effective dates for the components of the planning item.
Quantity	Define the component quantity (expressed in terms of a percentage) of the planning item. The forecast amounts at the parent level are multiplied by the quantity for the component to determine the forecast to be associated with the component.

Creating Aggregate Items

To create aggregate items, use the Aggregate Items component.

Use aggregate items to consolidate demand for multiple items when consuming forecast for a planning item. The aggregate parent and child items typically correspond to the parent and component items on a planning BOM. These two separate structures, planning BOMs (to allocate forecasts) and aggregate items (to sum demand), enable you to place forecast on alternate items that are not included in the current demand stream.

Note: Aggregate items do not always correspond to forecast families. The aggregate parent must always be a planning item. You can create hierarchies of aggregate items.

This topic discusses how to create aggregate items.

Page Used to Create Aggregate Items

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Aggregate Items Page</u>	PL_AGG_DMD_ITEM	Create aggregate items.

Aggregate Items Page

Use the Aggregate Items page (PL_AGG_DMD_ITEM) to create aggregate items.

Navigation

Supply Planning > Define Planning Attributes > Aggregate Items

Item ID	Select an item to include in the corresponding aggregate parent item.
Description	When you select a value in the Item field, the system displays the item's description.

Defining Forecast Percentages

To define forecast percentages, use the OM Forecast Percentage component.

This topic provides an overview of forecast percentages and discusses how to define forecast percentages.

Page Used to Define Forecast Percentages

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Forecast Percentages Page</u>	PL_OM_FCST_PCT	Define how much of a product forecast quantity should be directed to a PeopleSoft Inventory business unit.

Understanding Forecast Percentages

PeopleSoft Supply Planning uses forecast percentage to allocate the forecast that is defined for a product (defined in the PeopleSoft Order Management business unit) among multiple PeopleSoft Inventory business units.

In PeopleSoft Order Management, you can define forecasts at the product and order-management business unit level. A single product and PeopleSoft Order Management business unit combination might correspond to an inventory item that is held at multiple PeopleSoft Inventory business units. Forecast percentages map the product at the PeopleSoft Order Management business unit to one or more inventory items at the PeopleSoft Inventory business unit level to enable PeopleSoft Supply Planning to use inventory items.

You can link a PeopleSoft Order Management business unit to more than one PeopleSoft Inventory business unit. This table lists how you can allocate the forecast percentage:

<i>Order Management Business Unit</i>	<i>Inventory Business Unit</i>	<i>Forecast Percentage</i>
GBR01	GBR01	50 percent
GBR01	GBR02	25 percent
GBR01	CAN01	25 percent

Forecast Percentages Page

Use the Forecast Percentages page (PL_OM_FCST_PCT) to define how much of a product forecast quantity should be directed to a PeopleSoft Inventory business unit.

Navigation

Supply Planning > Define Planning Attributes > Forecast Percentages

Forecast Percentage

Enter the percent to allocate a specific forecast percentage to the business unit or product and business unit combination. The percentage can be any number. Even if you define more than one effective-dated percentage, the system does not require that the percentages total 100 percent; totals can also exceed 100 percent.

Setting Up Demand Priority Rules

To set up demand priority rules, use the Demand Prioritization component.

PeopleSoft Supply Planning enables you to define a set of rules to prioritize the distribution of demand when demand exceeds the available supply of inventory or capacity. The system uses these demand priority rules to determine the order in which you fulfill independent demand.

This topic provides an overview of demand priority rules and discusses how to set up demand priority rules.

Page Used to Set Up Demand Priority Rules

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Demand Priority Rules Page</u>	PL_PRIO_DEMAND	Set up demand priority rules based on the demand source.

Understanding Demand Priority Rules

In PeopleSoft Supply Planning, you define the demand prioritization rules that are specific to a business unit that you model. The Load Planning Instance process uses the demand priority rules to generate the priority for a given independent demand. When the priority is established, the system passes the independent demands with different priority codes to the planning instance. A demand priority code can

range from 1 to 999, with 1 being the most important. The priority value of 0 is reserved for the system. The planning solvers use the demand priority code to determine which independent demand to fulfill first so that higher priority demands are fulfilled before lower priority demands in situations in which enough available supply or capacity is not available to meet the various demands.

Note: Demand priorities are considered by the Feasible solver only. The Material solver does not consider demand priorities.

Demand Priority Rules Page

Use the Demand Priority Rules page (PL_PRIO_DEMAND) to set up demand priority rules based on the demand source.

Navigation

Supply Planning > Defining Planning Attributes > Demand Priority Rules

Priority Rank

(Required) Define the priority to be assigned to each independent demand that satisfies a given priority rule. The lower the value that you select, the higher the priority. The highest value is 999, which is the lowest possible priority, and the lowest value is 1, which is the highest possible priority. A priority rank value of 0 is reserved for the system.

The Demand Source represents the source of independent demand to which the prioritization rule applies.

Buying Agreements

A buying agreement is a schedule between you and the customer who is defining terms and conditions. Buying agreements enable you to define beginning dates, ending dates, and maximum amounts; specify the minimum dollar value per order placed, as well as the maximum and minimum line item ordering quantities for each line item; define certain shipping defaults for all sales orders, as well as all products and product groups to be included; define special pricing terms for a customer or customer group; generate sales orders automatically when customers know in advance when products are needed; create sales orders in situations in which shipment scheduling is unknown; and create rebates and penalties.

Forecasts

The total expected sales to all customers that you can maintain at the product, inventory-item, or planning-item level. At the planning-item level, sales are forecasted by families and exploded to inventory items through planning bills of material.

Interunit Transfers

Outbound transfers that represent independent demand in the planning model.

Quotations

An order management quotation is considered a demand and sent to PeopleSoft Supply Planning when the quotation success percentage is over the planning success percentage on the load planning instance run control.

<i>Sales Orders</i>	Represents a scheduled shipment on a line on a customer order from the order management system.
<i>Stock Requests</i>	Material stock requests that come from inventory but that are not transfers. A stock request might refer to an internal or external fulfillment.
Demand Priority Family	<p>(Optional) A planning priority family represents an item or a group of items that can be used as criteria for prioritization. You define demand priority families in PeopleSoft Inventory.</p> <p>See Setting Up Demand Priority Families.</p> <p>See "Demand Priority Family Page" (PeopleSoft FSCM 9.2: Managing Items).</p>
Reservation Status	(Optional) Select <i>Reserved</i> if the corresponding order has been reserved against available and projected quantity on-hand at the business unit and item level. Otherwise, select <i>Unreserved</i> . This field value is available only if you select <i>Sales Orders</i> , <i>Inter-Unit Transfers</i> , or <i>Stock Requests</i> in the Demand Source field.
Customer Group	(Optional) Select to identify as a customer allocation group, a group corresponding to one or more ship-to customers. This field is available only if you select <i>Sales Orders</i> , <i>Quotations</i> , or <i>Buying Agreements</i> in the Demand Source field.
Priority	(Optional) Enter an order priority value between 1 and 999. For a given priority rule, all sales orders with an order priority that is less than or equal to the value in this field are considered to match this parameter. For example, if you enter a value of 100 here, the system considers all sales orders with an order priority of 100 or less as matching this parameter. This field is available only if you select <i>Sales Orders</i> in the Demand Source field.
Destination Unit	(Optional) Select a value to prioritize demand for a specific destination business unit. This field is available only if you select <i>Inter-Unit Transfers</i> in the Demand Source field.

Note: To create a priority rule, you must define a value for the Priority Rank field, and enter a value in at least one of the remaining fields on this page.

Setting Up Business Unit Groups

To set up business unit group codes, use the Group Codes component.

A business unit group represents all of the business units that you want to include in a planning instance. You must define at least one business unit group for PeopleSoft Supply Planning. If in the business operations you require only one business unit, define the business unit group with a single business unit.

This topic discusses how to set up business unit groups.

Note: PeopleSoft Supply Planning business unit groups are defined with inventory business units only.

Page Used to Set Up Business Unit Groups

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Business Unit Group Definition Page</u>	PL_GROUP_IN	Set up business unit groups and define options for business units.

Business Unit Group Definition Page

Use the Business Unit Group Definition page (PL_GROUP_IN) to set up business unit groups and define options for business units.

Navigation

Supply Planning > Define Planning Attributes > Business Unit Groups

Business Units Tab

Select the Business Units tab.

Business Unit

Add the business units that you want to include in the plan unit group. The system displays a description that is adjacent to the business unit.

MFG BU (manufacturing business unit)

Indicates whether the corresponding inventory business unit is also defined as a manufacturing business unit. This field is not available for entry.

Options

Select the Options tab.

Round Component Demand

Select to limit component demand quantities to the precision that is associated with the item based on its standard unit of measure. This option is applicable for Manufacturing business units only.

Available Inventory Balances

Select to include quantity on hand for this business unit.

Reverse Quarantine Quantity

If quarantine quantities are not included in the quantity on hand in PeopleSoft Inventory, select to include quarantine quantities in the quantity on hand in PeopleSoft Supply Planning. If quarantine quantities are included in the quantity on hand in PeopleSoft Inventory, select to exclude quarantine quantities in the quantity on hand in PeopleSoft Supply Planning.

Allow Substitution

Select to allow solvers to do component substitution to resolve constraints. This option is available for Manufacturing business units only.

Create Substitute Supply

Select to allow solvers to create a new supply for substitute components to resolve constraints. If you do not select this option, the substitute algorithm may use on-hand quantities only. This option is available when you select the Allow Substitution option only.

Check Substitute First

Select to allow solvers to use substitute components before using alternate sourcing options. If you do not select this option, a solver determines alternate sourcing options prior to attempting to use substitutes when resolving a constraint failure. This option is available only when you select the Allow Substitution option.

Defining Display Templates

To define display templates, use the Workbench Template Maintenance component.

This topic includes an overview of display templates and discusses how to define display templates.

Page Used to Define Display Templates

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Define Display Templates Page	PL_WBENCH_TEMPLATE	Define display template default values.

Understanding Display Templates

PeopleSoft Supply Planning delivers standard display templates to enable you to set up default templates that you can use to define row type, graph, period duration, and other display defaults on workbenches and review pages.

These sections list the standard display templates in PeopleSoft Supply Planning:

Allrows

The Allrows template includes all display row types.

Supplier Schedule

The Supplier Schedule template includes row types for the following Buyer Based display types:

- Supplier Scheduled Purchases.
- Supplier Planned Purchases.

Distribution Plan

The Distribution Plan template includes row types for:

- Item Based display types:

- Starting On Hand.
- Actual Forecast.
- Net Forecast.
- Independent Demand.
- Dependent Demand.
- Total Demand.
- Scheduled Receipts.
- New Planned Orders.
- Planned On Hand.
- Intransit Inventory.
- Safety Stock.
- Capacity Based display types:
 - Available Capacity.
 - Required Capacity.
 - Unused Capacity.
 - Utilization percentage.
 - Overloaded Capacity.
- Buyer Based display types:
 - Starting On Hand.
 - Supplier Scheduled Purchases.
 - Supplier Planned Purchases.
 - Other Supply.
 - Total Demand.
 - Planned On Hand.

Master Plan

The Master Plan Template includes row types for:

- Item Based display types:
 - Starting On Hand.

- Actual Forecast.
- Net Forecast.
- Independent Demand.
- Dependent Demand.
- Total Demand.
- Planned On Hand.
- Available To Promise.
- Cumulative ATP.
- Scheduled Receipts.
- New Planned Orders.
- Capacity Based display types:
 - Available Capacity.
 - Required Capacity.
 - Unused Capacity.
 - Utilization Percentage.
 - Overloaded Capacity.
- Buyer Based display types:
 - Starting On Hand.
 - Supplier Scheduled Purchases.
 - Supplier Planned Purchases.
 - Other Supply.
 - Total Demand.
 - Planned On Hand.

Material Plan

The Material Plan template includes row types for:

- Item based display types:
 - Starting On Hand.
 - Net Forecast.

- Customer Orders.
- Stock Requests.
- Transfer Demand.
- Production Demand.
- Extra Demand.
- Total Demand.
- Scheduled Receipts.
- New Planned Orders.
- Planned On Hand.
- Capacity Based display types:
 - Available Capacity.
 - Required Capacity.
 - Unused Capacity.
 - Utilization percentage.
 - Overloaded Capacity.
- Buyer based display types:
 - Starting On Hand.
 - Supplier Scheduled Purchases.
 - Supplier Planned Purchases.
 - Other Supply.
 - Total Demand.
 - Planned On Hand.

Define Display Templates Page

Use the Define Display Templates page (PL_WBENCH_TEMPLATE) to define display template default values.

Navigation

Supply Planning > Define Planning Attributes > Display Templates

Default Template	Select to use this template as the default template when you access the Material or Capacity Workbench if no user default or installation default is identified.
System Data (Locked)	PeopleSoft Supply Planning provides the ALLROWS template as part of the system data. When this check box is selected, you cannot change rows in the corresponding template.
Display Type	<p>Define the template as <i>Item Based</i>, <i>Capacity Based</i>, or <i>Buyer Based</i>. The value that you select here determines which fields are available in the Row Type ID field. You define row types for each display type on the Define Display Row Types page.</p> <p>Display types indicate the workbench in which you can use any given row type. For example, an item-based display template is available in the Material Workbench only. You can use capacity-based display types in the Capacity Workbench only, and buyer-based display types in the Buyer Workbench.</p>
Default Number of Periods	Enter the default number of buckets the system displays on each workbench initially.
Default Graph Type	Select the graph type that the system uses initially.
Beginning Start Date	Define the start date of the first bucket. Values are <i>Beginning of Period</i> , in which the start date falls on a specific <i>Start Date Entered</i> . Initially, the system uses <i>Beginning of Period</i> as the default value. Templates with capacity-based display types always use <i>Beginning of Period</i> .
Template to Copy	To copy an existing template, select from the available options and click the Copy Template button.
Default Period Duration	Select a default period duration that the system uses for buckets.
Default Decimal Positions	Enter the default decimal precision that the system uses for quantity buckets.
Row Type List	
Row Type ID	Select a row type that you want to appear on workbenches and review pages. You can add as many rows as available for the corresponding display type. You can set up lists of available row types for each display type on the Define Display Row Types page.
Sort Order Number	Define the order in which the row types appear on the workbench or review page when displayed.
Include in Chart	Select this option to include the row type in generated graphic representations.

Defining Display Row Types

PeopleSoft Supply Planning enables you to create and maintain lists of available template rows for each workbench type.

This topic discusses how to define display row type lists.

Note: If you add new row types, you must also add the corresponding logic for calculating the row type on workbench and review pages. Predefined row types are delivered with calculations.

Page Used to Define Display Row Types

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Define Display Row Types Page	PL_WBENCH_ROWTYPES	Define display row type lists of available template rows.

Define Display Row Types Page

Use the Define Display Row Types page (PL_WBENCH_ROWTYPES) to define display row type lists of available template rows.

Navigation

Supply Planning > Define Planning Attributes > Display Row Types

Description

Enter a long and short description of the row that you want to make available for the corresponding workbench type.

PeopleSoft Supply Planning delivers row types for these display types:

- Item-based.
- Capacity-based.
- Buyer-based.

Item-Based Display Type

PeopleSoft Supply Planning delivers these item-based row types:

Actual Forecast

Displays the actual, unconsumed forecast for the corresponding period.

Available to Promise (ATP)

Determines the projected available inventory that has not been committed to customer orders. PeopleSoft Supply Planning uses this algorithm:

$$\text{ATP} = \text{Planned Receipts} + \text{Scheduled Receipts} - \text{Actual Demand} - \text{Carryover Demand}$$

$$\text{Planned Receipts} + \text{Scheduled Receipts} = \text{Total Supply row type}$$

Total Orders row type + Dependent Demand row type = Actual Demand

Carryover demand occurs when ATP is driven below 0 in a time bucket. If this occurs, supply is consumed from an earlier time bucket. ATP is reported as a negative number in the first bucket if carryover demand is not satisfied. PeopleSoft Supply Planning does not print ATP and cumulative ATP in the past due bucket (as it does not apply).

Buying Agreements

Displays the demand quantity for this item that is generated by buying agreements

Cumulative ATP

Cumulative or running total of ATP.

Dependent Demand

Displays the demand quantity that occurs when the item is required to meet demands of another transfer, planned transfer, production, or planned production order.

Excess Inventory

The maximum amount of inventory that is allowable. The planned inventory on hand should never exceed this number.

Excess is the defined excess level as of the end of the corresponding period. When you are summarizing multiple items, excess is the summarized excess levels for all items at the end of the corresponding period.

Note: When planned inventory on hand exceeds the excess inventory, PeopleSoft Supply Planning reports the violation in the exceptions inquiry only. The planning solvers do not solve for this condition.

Extra Demand

Displays demand quantity that you enter directly into a planning instance in the form of extra demand.

Independent Demand

Displays the total demand quantity from sales orders, quotes, buying agreements, stock requests, and extra demand.

Intransit Inventory

Interunit transfers that have been shipped but not received.
Appears in the destination business unit only.

Net Forecast

Displays the forecast quantity that remains after the actual forecast has been consumed by actual demand.

New Planned Orders

The sum of planned production, purchases, and transfers for an item in a period.

Periods Of Supply

A forward-looking calculation of a period's planned on-hand balance, which determines how many days into the future a period's planned on-hand balance covers the total demand.

When planned on-hand quantities are not enough to cover all of the total demand for a particular bucket, PeopleSoft Supply Planning prorates the number of days by the ratio of the planned on-hand quantity that is available over total demand. When not

	<p>enough total demand is available through the periods reported, the Periods of Supply bucket displays 99999.</p>
Planned On Hand	<p>Displays the cumulative projected inventory balance from the beginning of the planning horizon. This includes the prior period's ending on-hand balance plus the total supply, minus the total demand for the current period.</p>
Planned Production	<p>Displays the suggested production orders that were created for this period when you generated the supply plan solution.</p>
Planned Production Demand	<p>Displays the component demand for this item that was caused by other planned production orders in the planning instance.</p>
Planned Purchases	<p>Displays the suggested purchase orders that were created for this period when you generated the material plan.</p>
Planned Transfer Demand	<p>Displays the demand for this item that was caused by planned transfer orders in the planning instance.</p>
Planned Transfers	<p>Suggested transfer orders that were created by PeopleSoft Supply Planning.</p>
Production Demand	<p>Displays the total amount of demand (component demand) from planned production and scheduled production for this time period.</p>
Production Supply	<p>Displays the scheduled receipts from manufacturing for this time period. The receipts are in the form of production orders.</p>
Projected On Hand	<p>Displays the cumulative projected inventory balance from the beginning of the planning horizon. This includes the prior period's ending on-hand balance plus the known supply, minus the total demand for the current period. The projected on-hand does not include planned supplies in the calculation.</p>
Purchase Supply	<p>The scheduled receipts from suppliers for this period. The receipts are in the form of purchase orders.</p>
Safety Stock	<p>The defined safety stock level that is expected for the item as of the end of the corresponding period. When you are summarizing multiple items, the safety stock represents the sum of safety stock levels for the items that are being summarized as of the end of the corresponding period.</p>
Sales Orders/Quotes	<p>Displays the quantity of orders that were generated by customers, including real orders and any quotes that have been included in the planning instance.</p>
Scheduled Production	<p>The total amount of demand from production, with statuses of <i>Entered</i>, <i>Firmed</i>, <i>Released</i>, <i>Dispatched</i>, and <i>In-Process</i>.</p>
Scheduled Production Demand	<p>Displays the total amount of demand (component demand) from scheduled production for this time period.</p>

Scheduled Purchases	The sum of purchases, with statuses of <i>Firmed</i> and <i>Open</i> .
Scheduled Receipts	Displays the total quantity for this period from these row types: Scheduled Production, Scheduled Purchases, and Scheduled Transfers.
Scheduled Transfer Demand	Displays the total demand quantity for this period caused by scheduled transfers.
Scheduled Transfers	Displays the total amount of supply from transfer orders arriving at the destination business unit for this time period.
Starting On Hand	The cumulative inventory level at the beginning of the period. The history begins with the starting quantity for the planning horizon.
Stock Requests	Internal and external inventory orders (for noninterunit transfers only).
Total Demand	Defined as the sum of net forecast, customer orders, interunit orders, and dependent demand. The total demand consists of both independent and dependent demand.
Total Supply	Displays the total quantity of actual supply and new planned orders.
Transfer Demand	Displays the scheduled transfers to other business units in the form of transfer orders.
Transfer Supply	Displays the scheduled receipts from other business units in the form of transfer orders.

Capacity-Based Display Type

PeopleSoft Supply Planning delivers these capacity-based row types:

Available Capacity	The total capacity that is available for a period, measured in hours or units.
Overload Capacity	The amount that exceeds the available capacity (required capacity less available capacity when greater than zero).
Required Capacity	The amount of capacity that is consumed by production operations using a resource in a specific period, measured in hours or units.
Unused Capacity	Leftover capacity (available capacity less required capacity when greater than zero).
Utilization Percentage	The ratio between required capacity and available capacity when the available and required capacities are greater than zero.

Buyer-Based Display Type

PeopleSoft Supply Planning delivers these buyer-based row types:

Supplier Scheduled Purchases	Represents actual purchases for item and supplier or schedule group and supplier combinations.
Supplier Planned Purchases	Represents the total of planned purchases for item and supplier or schedule group and supplier combinations.
Previous Schedule's Approved Quantity	Displays the quantity on the last schedule that the supplier approved for supplier-scheduled items.
Current Schedule's Required Quantity	Displays a supplier scheduled item's current quantity.
Other Supply	Represents the combined total of all transfers, all production, all actual purchases not included in the item and supplier combination, and all planned purchases not included in the item and supplier combination.
Total Demand	Represents the combined total of net forecast, sales orders, quotes, buying agreements, transfers, stock requests, production demand, and extra demand.
Starting On Hand	<p>The cumulative inventory level at the beginning of a defined period. The history begins with the starting quantity for the planning horizon.</p> <p>For past due buckets, this value is determined by the inventory quantity on hand. For all other buckets, this value is determined by the planned on-hand inventory from previous buckets.</p>
Projected On Hand	Displays the cumulative projected inventory balance from the beginning of the planning horizon. This includes the prior period's ending on-hand balance plus the known supply, minus the total demand for the current period. The projected on-hand does not include planned supplies in the calculation.
Planned On Hand	Displays the cumulative projected inventory balance from the beginning of the planning horizon. This includes the prior period's ending on-hand balance plus the total supply, minus the total demand for the current period.
Safety Stock	<p>The minimum quantity of stock that is planned to always be in inventory to protect against fluctuations in demand or supply.</p> <p>This value represents the safety stock effective on the end date of the period.</p>
Excess Inventory	<p>The maximum amount of inventory that is allowable. The planned inventory on hand should never exceed this number.</p> <p>This value represents the excess stock that is effective on the end date of period.</p>

Note: When planned inventory on hand exceeds the excess inventory, PeopleSoft Supply Planning reports the violation in the exceptions inquiry only. The planning solvers do not solve for this condition.

Defining Attributes in PeopleSoft Supply Chain Management

Before using PeopleSoft Supply Planning, you must define attributes in other PeopleSoft applications within the PeopleSoft Supply Chain Management application suite. This topic details the key setup pages and components and discusses how to:

- Set up work center planning attributes.
- Define and review manufacturing BOMs.
- Define manufacturing routings.
- Define item attributes at the business unit level.
- Define planner codes.
- Establish closure calendars.
- Set up stocking periods.
- Set up demand priority families.
- Define transfer attributes.
- Define purchasing attributes.
- Define forecast sets.
- Define forecast product information.
- Create item forecasts.
- Apply Security for Business Units and Planning Instances.

Setting Up Work Center Planning Attributes

A work center can consist of one or more people and machines; it can represent a logical grouping of machines, a department, or a cost center. For a routing, you can assign to each operation or task a work center where the operation or task takes place. You can also assign one or more resources (crew, machine, or tool) to each work center.

You create and maintain work centers and their associated resources, conversion codes, text, locations, departments, and distribution types in the Define Work Centers component. When you add a new work center, or when you change any attribute in an existing work center, the system optionally sends a workflow notification to the roles that you have defined, such as an engineering manager or cost accountant.

Set up PeopleSoft Supply Planning work center options on the Define Work Centers - Planning Opts (define work centers - planning options) page.

Related Links

"Defining Work Centers" (PeopleSoft FSCM 9.2: Manufacturing)

Defining and Reviewing Manufacturing BOMs

PeopleSoft Supply Planning uses manufacturing BOMs for determining material requirements for production. On the Manufacturing BOMs component, you can create and maintain (on a summary level) all components that make up a manufacturing BOM or outsourced material for a group of assembly items or product families in a business unit.

Related Links

"Bills of Material" (PeopleSoft FSCM 9.2: Manufacturing)

Defining Manufacturing Routings

You can create and maintain routings using the Manufacturing Routings component, where you can define the routing code, operations, scheduling options, routing times, conversion costs, routing text, attachments, and the associated tasks, count points, work centers, and resources. You can specify a routing by business unit for any manufactured or purchased item. When you add a new routing, or when you change any attribute in an existing routing, the system sends a workflow notification to the roles—such as engineering manager or cost accountant—that you define.

Related Links

"Understanding Routings" (PeopleSoft FSCM 9.2: Manufacturing)

Define Business Unit Item - Planning Page

Use the Define Business Unit Item - Planning page to define business unit items

Navigation

Items >Define Items and Attributes >Define Business Unit Item and select the Planning tab

Image: Define Business Unit Item - Planning page: General

This example illustrates the fields and controls on the Define Business Unit Item - Planning page: General. You can find definitions for the fields and controls later on this page.

For each item, define information using the Define Items and Attributes - Define Business Unit Item - Planning pages:

- On the Planning - General page, define planning information for an item, such as whether the item is planned by distribution planning, master planning, or material planning, or is not planned. You can also define the PeopleSoft Purchasing sourcing option. Options include Use Ship To Locations, Use Item Supplier by Region, or Spot Buy. You can only select one method.
- On the Planning - Fences page, define planning time fences, planning message parameters, safety stock and excess stock parameters, lead times, new order fences, and other general information about how you will generate supply for inventory items.

Note: PeopleSoft Supply Planning generates recommendations for new orders, reschedules, or order cancellations and then routes these recommendations to PeopleSoft Inventory, Purchasing, Order Management, and Production Management. In many cases, the volume of changes number in the thousands. To help manage this activity more effectively, the system enables you to define a time fence and filters to control the message review and approval process.

- On the Planning - Order Modifiers page, define transfer, purchasing, and manufacturing order quantities, order multiples, yields, and whether to use the purchase order modifier.

Note: For transfers, you can set up order modifiers on the Transfer Attributes page. The system uses the transfer order modifier values that you define on the Planning - Order Modifier page when you do not define values on the Transfer Attributes page. You can select the Include in Planning check box on the page to indicate that sourcing options will be created for this given item and business unit. You can also select to Include in Planning check box on the Transfer Attributes Defaults page.

Note: If you select the Use Purchase Order Modifier check box, the system uses the item's purchasing attributes defined on the Supplier's UOM and Pricing Information page.

For more information about the Planning page, see the documentation — PeopleSoft Managing Items.

See "Define Business Unit Item - Planning: General Page" (PeopleSoft FSCM 9.2: Managing Items).

Defining Planner Codes

Use planner codes to filter information for most pages and processes in PeopleSoft Supply Planning. Define planner codes on the Planner Code page.

Establishing Closure Calendars

The PeopleSoft Inventory closure calendar enables you to specify when the business units are closed for various inventory and purchasing activities. You use the Closure Calendar page to schedule regular (standing) closure days or specific closure periods and associate these closures with shipping, interunit and RMA receiving, and internal warehouse activities. If the installation includes PeopleSoft Purchasing, you can also define calendar closures for purchasing receiving activities.

Related Links

"Establishing Operation Closure Dates" (PeopleSoft FSCM 9.2: Inventory)

Setting Up Stocking Periods

Set up time-phased safety stock and excess stock levels on the Stocking Periods page. The information that you enter on this page overrides any stocking-level information that you entered on the Define Business Unit Item - Planning: Fences/Lead Time page.

Related Links

"Stocking Periods Page" (PeopleSoft FSCM 9.2: Managing Items)

Setting Up Demand Priority Families

Group similar items to establish a common priority for all items within a single group on the Demand Priority Family page. This setup set enables the system to establish demand priorities in PeopleSoft Supply Planning.

Related Links

"Demand Priority Family Page" (PeopleSoft FSCM 9.2: Managing Items)

Defining Transfer Attributes

Define item transfer attributes to plan transfer for items between business units. Using the Transfer Attributes page, you can define transfer attributes for individual items. PeopleSoft Supply Planning uses these attributes that you define on the Transfer Attributes page to help fulfill material needs. After you

set up transfer attributes, you can use them to set up sourcing template transfer options for an item on the Define Sourcing Templates page.

Related Links

[Setting Up Sourcing Templates](#)

Defining Purchasing Attributes

If you are using PeopleSoft Purchasing, use the Define Items and Attributes - Purchasing Attributes component to enter data that PeopleSoft Supply Planning requires.

- On the Purchasing Attributes page, define the lead time and the primary buyer for the purchased item.
- On the Item Supplier page, define the suppliers from whom you can purchase the corresponding item.

PeopleSoft Supply Planning recommends this supplier to PeopleSoft Purchasing for each planned order. If you do not specify a supplier for a purchased item, PeopleSoft Supply Planning creates a planned order without a supplier. In this scenario, you can use the purchase order load process to assign a supplier to the item. PeopleSoft Supply Planning ranks multiple suppliers for the same item based on the values that you define in each supplier's corresponding Priority field.

- Define a ship-to location that represents an Inventory business unit. When you set up a purchase option, you can define a ship to location as an attribute only if the item has purchasing attributes. If an item has purchase attributes defined but no ship to locations, the system assumes that the item can be ordered at any Inventory business unit.

Defining Forecast Sets

Whether you forecast products at the Order Management business unit level, forecast items at the Inventory business unit level, or use planning BOMs to forecast at the Inventory business unit level, you must define one or more forecast sets. Use the Forecast Sets page to define different versions of the forecast for PeopleSoft Supply Planning to create what-if scenarios with different versions of the material and capacity plan based on the different forecasts.

You might, for example, have three versions of a forecast: a conservative forecast, a most likely forecast, and an optimistic forecast. For each case, you can define forecast quantities by item. You use forecast sets for product forecasts in order management and item forecasts in inventory.

If you use Demantra Demand Management forecast data, you do not have to define forecast sets, because you obtain the forecasts from PeopleSoft Publish Forecast tables that are available in the Advanced Planning component. Demantra Demand Management provides a flat file (forecast.txt) of forecasts through the Process Integration Pack. Using the PeopleSoft Import Forecast routine, you can import the file into the Publish Forecast tables in PeopleSoft. After the import, the file is available for use by other PeopleSoft modules such as PeopleSoft Supply Planning and Inventory. To access the routine, select SCM Integrations > Advanced Planning > Demantra > Import Forecast.

Related Links

"Understanding Demantra Integration" (PeopleSoft FSCM 9.2: Supply Chain Management Integration)

Defining Forecast Product Information

In PeopleSoft Order Management, you can define product forecast information. PeopleSoft Supply Planning uses forecast sets to define different versions of a forecast. You associate products with forecast sets on the Forecast Products page.

Creating Item Forecasts

Use the Forecast Items page to associate items with forecast sets. You select a forecast set that you want to use in PeopleSoft Supply Planning. You set up forecast sets on the Forecast Sets page to create *what-if* scenarios with different versions of the material and capacity plan based on different forecasts.

See "Forecast Sets Page" (PeopleSoft FSCM 9.2: Application Fundamentals).

Applying Security for Business Units and Planning Instances

This is an optional step, only if you turn on the Security Option; you have to continue to define security on BU or Planning Instance, or User ID or Permission List.

Financial and Supply Chain Setting for Security allows users to define security rules, which refers to the row level (User ID) or permission list security. User ID and permission list security is defined using the Security Options page.

When security is defined for Business Unit by User ID, only the business unit allowed for this User ID will be displayed in Business Unit prompt. The same is true for Planning Instance. When the security is on for Planning Instance by User ID, only the planning instance defined for this user can be seen in the Planning Instance prompt. Business Unit by Permission List or Planning Instance by Permission List works the same way.

When both Planning Instance and Business Unit are on the search page, only one security would rule the page, and this is the Planning Instance security. Hence, the suggested way for the Setup is to define both Business Unit and Planning Instance security in the Security Option. Business Unit security is used primarily at Define Planning Instance Attribute, for Business Unit Group creation, and for Commit Plan search. In other areas, such as Solve Plan and Refine Plan, Planning Instance's security is used. It is with the assumption, that when a user defines the Business Unit group, he/she has access to all Business Unit within his/her security setup. When the security setup is changed that would impact the list of Business Unit allowed for this User ID, user should update the Business Unit group and reload of Planning Instance to reflect the change.

Establishing the Planning-Solving System

Common Elements Used to Create Planning Instance Definitions

Category	Select the search criteria by a specific category ID code. Category information reduces redundant data entry during item setup and requisition and purchase order processing. The system assigns default purchasing attributes of an item category to any item in that category.
Family	Select the search criteria by a specific item family code. In PeopleSoft Inventory, you can categorize items by groups and families. No formal relationship exists between item groups and item families, but you can use an item family to further classify an item group. For example, you can define that the hardware group consists of families of fresh water equipment and salt water equipment.
Item Group	Select the search criteria by a specific item group code. In PeopleSoft Inventory, you can group similar items together to create categories of items for alternate search keys and for reporting analysis.
Plan Unit Group	Displays a value based on the value that you selected in the Planning Instance field.
Planner Code	Select the search criteria by specific planners.
Utilization Type	Select the search criteria by a specific utilization type code. The system uses utilization types in conjunction with the Due To Count option for cycle counts.

Creating Planning Instance Definitions

To create planning instance definitions, use the Problem Instance Definition component.

This topic provides an overview of planning instance IDs and discusses how to create new planning instance IDs.

Page Used to Create Planning Instance Definitions

Page Name	Definition Name	Usage
<u>Planning Instance Page</u>	PL_PROBINST_DEF	Create new planning instances.

Understanding Planning Instance IDs

Planning instance IDs define a complete set of data analyzed to create a feasible supply plan. When you create a planning instance ID, define which inventory business unit group and which items you want to include in the planning model. When you run the Load Planning Instance process (PL_LOAD_OPT), you incorporate into the planning instance business unit data such as calendars and business unit planning options; item-specific data such as item planning options, inventory positions, sourcing options, supplies, and demands; and capacity-specific data such as work-center capacity definitions. All PeopleSoft Supply Planning occurs within a planning instance.

The Planning Instance table (PL_PROBINST) contains information pertaining to the state of the planning instance and the data that it comprises, including the types of data loaded, the range of dates used to select data, and global attributes used by the planning solvers.

Planning Instance Locks

The system locks the planning instance data tables at the beginning of the Load Planning Instance process to prevent two processes from updating the same subset of the planning instance concurrently. It releases the locks only if the process terminates normally. If the process terminates, release these locks manually on the Planning Instance Lock page, where you can also verify that a Load Planning Instance process is not currently running for a planning instance.

Planning Instance Inquiry

PeopleSoft Supply Planning provides a planning instance inquiry component to enable you to view the data that is used to create the corresponding planning instance dataset and view the current planning instance attributes.

Safety Stock Option

In SCM Inventory, you can define stock period for an item. A stocking period consists of start time and end time, safety level, excess level, safety limit, and excess limit. Safety limit is the lower bound of the safety stock, and excess limit is the upper bound of the safety stock. Safety and excess levels are the preferred safety stock level and excess stock level. For planning, stocking period's start and end time and safety limit are the only concerns when solving for the safety stock demand.

Since a planning instance has a start and end time, and early fence and late fence where the demands are planned, the stock periods will be processed, so only those falling inside the planning horizon will be processed.

Planning always takes the start time of the stock periods, and the increased safety stocking level as demand when planning its supplies. In addition, when considering early fence, late fence and item phase out date, the safety stock demand date is further adjusted when its period lands on those dates.

PeopleSoft Supply Planning provides a safety stock flag, which is global for planning instance, and is applied to all the Show Demand places. This flag is passed to plugin for Show Demand's transaction to

process. To read in the changed flag, shutting down the engine is not required. The default for this flag is “Fulfill”.

In either MRP or Feasible solver, the safety stock is fulfilled using the start time of stocking period and increased safety limit quantity from the previous highest safety limit, except the first period. First period’s safety stock demand is the safety limit quantity. There are some special handlings with regard to the safety stock demand date as discussed below. This special handling also depends on safety stock setting in MRP Solver run control and Feasible Solver run control. There are three selections that a user can pick when considering the safety stock:

Fulfill

This setting ensures the solver to fulfill the safety stock from the planning period start, or the early fence when the demand is considered. All stocking periods outside of the planning period are discarded. For periods that lands in the early fence, its start time will be adjusted to the early fence. For the period that lands on the late fence, its end date will be adjusted to the late fence. An existing item phased out date overrides the late fence and changes the end time for considering the stock period to the phased out date, if it is earlier then the late fence.

The system uses the same logic in Show Demand for Fulfill setting.

Ignore until First Demand

This setting ensures the solver to delay considering the safety stock until it sees the first demand. That is, not to solve plan just for safety stock. With this setting, the demand date for the first safety stock period is adjusted to the first demand date.

The system uses the same logic in Show Demand for Ignore until First Demand setting.

Ignore

This setting ensures the solver to completely ignore the safety stock demand.

The system uses the same logic in Show Demand for Ignore.

Planning Instance Page

Use the Planning Instance page

Navigation

Supply Planning >Create Plan >Planning Instances

Image: Planning Instance Page

This example illustrates the fields and controls on the Planning Instance Page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Planning Instance' page with the following fields and controls:

- Planning Instance:** USBIKE
- *Description:** US Bike Business Units MPS
- Status:** Defined, 05/13/2011 8:23AM
- *Planning Business Unit Group:** USBIKE
- Safety Stock Option:** Fulfill
- Item Selection:**
 - Planned By Item Types:** All
 - Planner Code:** (empty)
 - Family:** (empty)
 - Item Group:** (empty)
 - Category:** (empty)
 - Utilization Type:** (empty)

At the bottom, there are buttons for Save, Return to Search, Notify, Add, and Update/Display.

Status

Displays the status of the Planning Instance Load process for the corresponding planning instance ID or the last major data exchange that occurred for the planning instance.

Safety Stock Option

Select the desired safety stock option from:

1. *Fulfill*: This is the default
2. *Ignore until First Demand*
3. *Ignore*

Planned By Type

Select only those items that are associated with the specified planned by types.

Note: A change to the item selection criteria has no effect on the next regenerative select or net change Load Planning Instance process run. Field values in the Item Selection group box apply to full regenerations only.

Creating a Planning Cycle

This topic provides overviews of planning cycles and planning cycle setup and discusses how to define planning cycle criteria.

Page Used to Define a Planning Cycle

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Planning Cycle Page	PL_CYCLE_REQ	Define the planning cycle criteria.

Understanding Planning Cycles

PeopleSoft Supply Planning facilitates lights-out processing, enabling you to run a complete planning process overnight. Using the Planning Cycle component, you run a solver, perform mass maintenance, and commit the plan process. You must set up run controls prior to setting up the cycle for all the processes except the starting the planning engine and shutting down the engine.

Note: Ensure that you define the same level of security for the Planning Cycle page as that of each individual process that is included in the planning cycle.

Plan Process Creation

To create a plan, you need to first load the planning instance. You define the frequency with which you load the planning instance using a run control that you define. The system populates the planning instance tables based on the business unit groups and item filters that you defined on the Planning Instance Definition page and based on the parameters that you defined on the Load Planning Instance run control.

Note: You must create a planning instance prior to running a planning cycle.

Plan Solutions

When solving a plan, you can perform mass maintenance in any processing order. Performing mass maintenance is an optional step that enables you to perform preprocessing on the data before the solvers run or before the system commits the plan. For example, you might perform mass maintenance prior to a solver run to reschedule past-due orders or freeze specific orders. You might perform mass maintenance after a solver run to freeze, auto-approve, or consolidate orders.

To solve the plan, run one PeopleSoft Supply Planning solver against the planning instance.

Plan Process Commitment

To commit a plan, you must run the Post Updates process. This process obtains data from the planning instance tables and generates update messages for the other PeopleSoft SCM applications, including PeopleSoft Production Management, Inventory, Supplier Relationship Management, and Order Management. You can review the update messages using these components under the Supply Planning - Commit Plan menu:

- Review Inventory Post Errors.
- Approve Inventory Updates.
- Review Production Post Errors.
- Approve Production Updates.
- Review Purchasing Post Errors.

- Approve Purchasing Updates.
- Review Order Management Post Errors.
- Review Order Management Updates.
- Planning Updates report.

Understanding Planning Cycle Setup

Before you can use lights-out mode and other optimization features, you must use the PeopleSoft Integration Broker to configure the Supply Planning service operations and routings that send and receive optimization messages. PeopleSoft delivers most of the service operations and routings with a default status of *Inactive*; however, these Supply Planning service operations and routings are delivered in active mode.

To set up this EIP within PeopleSoft Integration Broker and Enterprise Components, use the information in the table below and refer to the setup instruction in the PeopleSoft Supply Chain Management Integrations documentation, "Implementing Integrations" set of topics, Setting Up Service Operations section.

To set up this service operation:

1. Set up within the PeopleSoft Supply Planning application:

Use the Planning Cycle process page to define the run control with the planning cycle criteria.

2. Set up within PeopleSoft Integration Broker and Enterprise Components:

Use the information in the table below and refer to the setup instruction in the documentation PeopleSoft Supply Chain Management Integrations, "Implementing Integrations" set of topics, Setting Up Service Operations section.

Service Operation	Direction and Type	Handlers	Chunking Available?	Integrates With
OPT_CALL	Synchronous	REQUESTHDLR	No	Third-party analytics server
SPL_OPT_CALL	Synchronous	REQUESTHDLR	No	Third-party analytics server
SPL_OPT_CALL_ARRAY	Synchronous	REQUESTHDLR	No	Third-party analytics server
SPL_DMD_VIOLATIONS_EXTRACT	Synchronous	REQUESTHDLR	No	Third-party analytics server
SPL_REMOTE_CALL	Synchronous	REQUESTHDLR	No	Third-party analytics server
SPL_SHOW_SUPPLY_DEMAND	Synchronous	REQUESTHDLR	No	Third-party analytics server

See the product documentation for *PeopleTools: Integration Broker*

Planning Cycle Page

Use the Planning Cycle page (PL_CYCLE_REQ) to define the planning cycle criteria.

Navigation

Supply Planning > Create Plan > Planning Cycle

Use this page to select the steps that you want to include in the planning cycle. Each step of the planning cycle might require that the optimization engine be available or unavailable when running a step.

The Load Planning Instance and Post Updates processes require that the optimization engine be unavailable, while other planning processes require that the planning engine be running. For the Load Planning Instance and Post Updates processes, you can define the availability of the planning engines for a job using the Process Scheduler. You can select the Pre Auto-Shutdown or Post Auto-Startup check boxes when defining the jobs. The Start Planning Engine and Shutdown Planning Engine planning process types are available in the planning cycle. This is an alternate way to start and stop a planning engine before a job is run in the planning cycle.

The Load Planning Instance process and Post Updates process steps require that the optimization engine be unavailable, while other planning steps require that the planning engine be running. Each Application Engine job requires that the planning engine be started before the job is run and shut shutdown after the job is completed or that the engine be shutdown before running the job, and then restarted after the system completes the job.

You define the availability of the planning engines for a job using the Process Scheduler. You can select the Pre-Process Auto Startup check box or the Post-Process Auto Shutdown check box.

Planning Instance

The system initially populates this field with the value that you defined on the Define User Preferences - Planning page. If you defined no user preference, the system populates this field with the default value that you defined during installation. This field is required.

Note: Availability of certain processes depends on the planning engine status for a planning instance. For example, you cannot run the Load Planning Instance process if you have started the planning engine. Conversely, you cannot run the mass maintenance or solver processes unless you have started a planning engine. You can define each process to start or stop a planning engine automatically.

Default

Click to generate the steps of a planning cycle based on default values. These values include:

- Load Planning Instance/(Pre-Solver)
- Mass Maintenance/Initiate Material Solver/(Post-Solver)
- Mass Maintenance/Extract Demand Violations/Post Updates

Cycle Processes

You use the group box to define planning processes for a planning instance. The processes appear in the Planning Process column.

Step	Displays the order of the processing steps. PeopleSoft Supply Planning runs the processes in the sequence in which they are presented on the Process Cycle page.
<i>Apply Inventory Updates (no engine)</i>	Select to initiate the IN Apply Planning Messages COBOL process that processes the PeopleSoft Inventory updates that you have approved. This process applies the updates so that PeopleSoft Inventory can act on the suggestions made by PeopleSoft Supply Planning.
<i>Apply Production Updates (no engine)</i>	Select to Initiate the Apply Planning Messages COBOL process to process the production control updates that you have approved. This process applies the updates so that PeopleSoft Production Management can act on the suggestions made by PeopleSoft Supply Planning.
<i>Capacity Report</i>	Select to create the Capacity Usage report. The run control generates a report with the capacity usage for work center resources across a production period.
<i>Detail Resources Report</i>	Select to create the Detail Resources report. The run control generates the report that lists the number of machines, crews, and tools used in a production process.
<i>Excess Stock Report</i>	Select to create the Excess Stock report. The run control generates the report that lists the quantity and value of on-hand stock levels that are above the excess and safety stock levels at period end.
<i>Extract Demand Violations</i>	Extract demand violations for orders that are pegged to low-level orders with violations.
<i>Extract Pegging Information</i>	Select to extract pegging information. The run control extracts information on supply that has been pegged to top-level demand.
<i>Initiate Feasible Solver</i>	Select to initiate the Feasible Solver process in the planning cycle. <hr/> Note: You can run a solver only after you have loaded the planning instance into a planning engine. If you elect to include a solver process, select the solver to run in the Solver field. Values are <i>Material</i> , <i>Feasible</i> , and <i>Enterprise</i> . <hr/>
<i>Initiate Forecast Consumption</i>	Select to initiate forecast consumption processing. The run control provides the planning instance against which you want to consume a forecast.

Initiate Material Solver

Select to initiate the Material Solver process. The run control defines the material planning options and runs the Material solver.

Note: You can run a solver only after you have loaded the planning instance into a planning engine.
If you elect to include a solver process, select the solver to run in the Solver field. Values are *Material*, *Feasible*, and *Enterprise*.

Load Planning Instance

Select to include all of the processes that are required to populate the planning instance tables.

Mass Maintenance

Select to perform mass maintenance on the data before the solver process.

Note: You can perform mass maintenance only after you have loaded the planning instance into a planning engine.

Planning Report

Select to create the Planning report. The run control defines report print options and filter criteria and generates the report.

PO Auto Sourcing Option (no engine)
(purchase order sourcing option)

Select to initiate the purchase order sourcing options. This process applies the updates so that PeopleSoft Purchasing can act on the suggestions made by PeopleSoft Supply Planning.

Planning Reschedule Report

Select to create the Planning Reschedule report. The run control generates the report that lists all of the reschedule messages, including production, purchase order, transfer, sales order and quote, buying agreement, extra demand, and stock request messages.

Planning Updates Report (no engine)

Select to run the Planning Updates Report. The run control defines the search criteria for the report that displays a list of planning updates generated by PeopleSoft Supply Planning.

Planning Useup Report (no engine)

Select to run the Planning Useup Report. The run control defines business unit and item parameters to generate a report that displays use-up items, their phase-out dates, and their substitute items.

Post Updates

Select to post the updates to PeopleSoft SCM Integrations Advanced Planning.

Projected Stock Out Report

Select to create the Projected Stock Out report. The run control generates the report that calculates the date at which an inventory level will fall to zero (or near zero).

Shutdown Planning Engine

Select to shutdown the Planning Engine.

Slow Moving Inventory Report

Select to create the Slow Moving Inventory report. The run control generates the report for a specified planning instance and lists items with on-hand inventory and little or no demand.

<i>Start Planning Engine</i>	Select to start the Planning Engine.
Run Control ID	Select a run control ID for each corresponding process that you want to include in the planning cycle.
URL (uniform resource locator)	Select a URL for use with the run control.
View Run Control	Click to access the run control page for the corresponding planning process.

Loading Planning Instances

This topic provides an overview of the Load Planning Instance process.

Pages Used to Load Planning Instances

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Load Planning Instance - General: Common Page</u>	PL_LOAD_OPT_REQ1	Define general planning parameters, such as time frames and run type, and start solvers.
<u>Load Planning Instance - General: Inventory Policy Page</u>	PL_LOAD_OPT_REQ8	Define general PeopleSoft Inventory Policy Planning parameters.
<u>Load Planning Instance - Orders/Forecast: Orders Page</u>	PL_LOAD_OPT_REQ2	Define supply and demand order type parameters.
<u>Load Planning Instance - Orders/Forecast: Forecasts Page</u>	PL_LOAD_OPT_REQ3	Define supply and demand forecast type parameters.

Understanding the Load Planning Instance Process

When you transfer information from the transaction system to the planning instance, you must populate the optimization tables that make up the planning instance with information that is pertinent to PeopleSoft Supply Planning.

To populate the optimization tables, enter information on the Load Planning Instance component run control page. This information—the types of data to include in the next run of the Load Planning Instance process—is keyed by planning instance and is saved onto the Planning Instance table, enabling you to determine all parameters that are used for the current incarnation of the planning instance.

Note: You must create a planning instance before you specify it on the Load Planning Instance component run control page. Define planning instances on the Planning Instance Definition page, where you can associate business unit groups and items with a planning instance.

Optimization Table Data and Run Types

The optimization tables contain two types of data: static and dynamic. Static data refers to data that is updated less frequently, and generally includes item, bill of material, routing, business unit, date penalty,

calendar, and sourcing option data. Dynamic data refers to data that is often revised, added, and removed. Examples of dynamic data are forecasts, sales orders, production orders, transfer orders, quantity on hand, and purchase orders.

You can select from three run types when refreshing the optimization tables: full regenerative, regenerative select, and net change. Each run type processes static and dynamic data differently.

Multi-Process Optimization Table Load

You can load the optimization tables using the Optimization Table Load process (PL_LOAD_OPT) or using the Multi-Process Optimization Table Load job (PL_LDLOPT), which separates the Load Optimization process into several child processes to enable concurrency. Multi-process optimization enables you to use multi-CPU servers or schedule child processes to occur on different servers.

PeopleSoft Supply Planning uses JobSet functionality to enable you to schedule a combination of serial and parallel jobs. When you select the Multi-Process Opt Table Load job on the Process Scheduler page, the system schedules the processes to run serially or parallel, as needed. If a process fails, the system determines which, if any, subsequent processes it should run. For example, suppose that the Multi-Process Optimization Table Load Start process (PL_LOAD_MPS) fails; the system will not run subsequent processes. However, if the Production Opt Table Load process (PL_LOAD_PROD) fails, the system will still run the Sales Order Optimization Table Load process (PL_LOAD_SO), as the remaining processes in the Multi-Process Optimization Table Load job can run independently of the others. If any single process fails, you can correct the situation, then select the Regenerative Select run type option to load the corrected section.

Load Planning Instance - General: Common Page

Use the Load Planning Instance - General: Common page (PL_LOAD_OPT_REQ1) to define general planning parameters, such as time frames and run type, and start solvers.

Navigation

Supply Planning > Create Plan > Load Planning Instance

Image: Load Planning Instance - General: Common page

This example illustrates the fields and controls on the Load Planning Instance - General: Common page. You can find definitions for the fields and controls later on this page.

GeneralOrders/Forecast

CommonInventory Policy

Run Control ID 1Report ManagerProcess MonitorRun

*Planning InstanceUSBIKEPlan Unit GroupUSBIKE

Run TypeRegenerative

Base CurrencyRate Type

Fences (days)

*Current OptionOffsetCurrent Offset0Capacity365

Start0End365Early0Late365

Planning Engine

☐ Pre-Load Auto-Shutdown☐ Post-Load Auto-Startup

URLID

SaveReturn to SearchNotifyAddUpdate/Display

General | Orders/Forecast

Run Type

You can select from three run types when refreshing the optimization tables. Values are:

Regenerative: The system deletes all rows for a planning instance from the optimization tables, refreshes all of the static data, and refreshes the dynamic data that is specified in the run control parameters.

Regenerative Select: Enables you to refresh the dynamic data, such as forecasts, sales, buying agreements, production, transfers, stock requests, purchase orders, and quantities on hand. The system deletes all of the current rows for a planning instance involving the dynamic structures that you selected at run time and rebuilds only those dynamic tables. For the regenerative select run type, the system adds dynamic data only for items that already exist in the planning instance. The date range for the regenerative select option is based on the original full planning instance regeneration, and cannot be changed in the regenerative select mode.

Note: Ensure that the types of objects in the process instance remain synchronous. If you regenerate sales orders but not quantity on hand, for example, it is possible that a sales order that shipped will not be represented but the quantity on hand will still remain.

For example, suppose that the available inventory for an item is ten, and you receive a sales order requesting seven of that item.

Available inventory for that item is now three. In the transaction system, you record the shipment. As a result, the available inventory remains at three, while the outstanding quantity to ship is zero. If you refresh the sales orders in PeopleSoft Supply Planning, but you do not refresh the inventory quantity on hand, the inventory balance in PeopleSoft Supply Planning remains at ten, but the sales order demand is updated to zero. In this example, PeopleSoft Supply Planning assumes that it can satisfy demands of ten, when available inventory can only satisfy supplies of three.

Net Change: Enables you to add new rows and delete old rows of data from the optimization tables, and synchronizes the transaction and optimization tables with the least amount of data changes. The date range for this run type is based on the original full planning instance. The net change run type is available for dynamic data only.

Base Currency

Select a value if you want PeopleSoft Supply Planning to calculate item cost in a single, common currency when multiple currency values are valid. Currency codes that you set up on the Set Up Financials/Supply Chain - Currency Code page appear as values.

Rate Type

Select a value to define the exchange rate that the system uses to convert item costs from other currencies to the single currency code that you selected in the Base Currency field. You can use these two fields if you are transferring stock from a business unit that uses a different currency from the receiving unit. For example, suppose that you are transferring stock from Mexican pesos to Canadian dollars; you can select to convert those values to a single base currency, such as U.S. dollars. In doing so, you work with only a single base representation of costs in the planning instance.

See [Setting Up Sourcing Templates](#).

Fences

Current Option

Select either *Date* or *Offset*. Values that are entered in the Current Offset field will allow the planning fences to be based on a set amount of days earlier or later than the current date.

During a full regenerative run, the current date, start date, and end date can change; otherwise, the dates in the Current Option, Current Date, Start, and End fields are fixed at the dates determined by any original

regenerative run. You can modify the dates in the Capacity, Early, and Late fields to update the planning instance.

Use the start fence and end fence to define the data for inclusion in the planning instance. Use the early fence to define a date prior to which the solvers will make no changes. You can override the early fence on an item-by-item basis. Use the late fence as a cutoff point for the violation and exception workbenches. The system generates no violations or exceptions after the late fence. Use the capacity fence to limit capacity planning. The system does not plan for capacity after the capacity fence date.

Planning Engine

Pre-Load Auto-Shutdown	Select to stop the planning engine before running the Load Planning Instance process.
Post-Load Auto-Startup	Select to start the planning engine after you run the Load Planning Instance process.
URL	Specify the location of a planning server where you want to start the planning engine after the Load Planning Instance has finished. If you do not specify a URL here, the system uses the default URL. To obtain a URL, the system uses the domain that you use to run solver if the planning instance is running. If the planning instance is not running, and you did not specify a domain, or if the planning instance fails to start on the domain that you specify, the system uses the default domain that you define on the Planning Engine Domains page.

Load Planning Instance - General: Inventory Policy Page

A non-active page that is related to a deprecated product.

Load Planning Instance - Orders/Forecast: Orders Page

Use the Load Planning Instance - Orders/Forecast: Orders page (PL_LOAD_OPT_REQ2) to define supply and demand order type parameters.

Navigation

Supply Planning > Create Plan > Load Planning Instance

Apply Demand Priorities	Select if you want solvers to use demand priorities for scheduling supply to meet demand. PeopleSoft Supply Planning enables you to define a set of rules to prioritize the distribution of demand when demand exceeds the available inventory on hand. The system uses these demand priority rules to determine the order in which you fulfill demand. Set up demand priority rules on the Priority Rules page. If you do not select this option, the system assigns all of the demand transactions the same priority: 999.
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See [Setting Up Demand Priority Rules](#).

Delete Extra Demand

During a full regeneration of a planning instance, select this check box to purge the extra demand table for the planning instance. Deselect this check box to retain the extra demand.

You can use the PeopleSoft Supply Planning extra demand feature to simulate demand that has not been realized in the form of a sales order, quote, buying agreement, forecast, production component requirement, transfer order, or material stock request transaction type. The solvers consider extra demand as another demand stream. Unless the extra demand is frozen, solvers can reschedule extra demand to another due date.

Firm/Frozen Plan Orders Only

Select to include only planned orders with a firm or frozen status.

Freeze Pegged Orders

Select if pegged orders should be frozen as they are loaded into the Planning Instance. This will prevent the solvers from updating the orders.

Orders

Select the types of customer orders that you want to include in the Load Planning Instance process. You can include sales orders, quotes, or buying agreements.

Accept % (accept percentage)

If you elected to include sales quotes when loading the optimization tables, you can specify the quote acceptance percentage or the minimum success percentage acceptable as demand as defined on each sales quotation header. Consider, for example, that you defined the quote acceptance percentage as 80. If 1500 sales quotations are currently active in PeopleSoft Order Management, 350 of which have a success percentage of 80 percent or better, then the system considers the 350 quotations as demand. The system does not consider the sales quotations under 80 percent, because they are less than the quote acceptance percentage. If you do not specify a percentage here, no quotes are loaded.

Demand Date

The date on which the customer order demand is recognized. Solvers attempt to satisfy the demand on the selected date, and forecast consumption recognizes the demand as occurring on the selected date. Values are:

- *Schedule Date*: Select when you want the plan to recognize demand and consume the forecast based on the order scheduled ship date. This is the default value.

Because the planning solvers reschedule the customer orders scheduled ship dates based on the Demand Date option before the netting of demand and supply begins, you might want to select *Schedule Date*.

- *Request Date*: Select if you want the plan to recognize demand and consume the forecast based on the customer requested ship date.

Note: No scheduled ship dates exist for buying agreements, so the system selects *Requested Date* as the default value for all of the buying agreements.

Demand

Select any of the order demand types in this group box to include in the next Load Planning Instance process.

Supply

Select the types of supply that you want to include in the Load Planning Instance process. Usually, you want to include all of the supply options when using a regenerative run type. For net changes, you can create a separate run control to include net change data for different types of supply and demand. For example, you can create a net change run control to select production data at the end of each shift.

On Hand Options

Quantity On Hand

Select to include inventory balances when loading data into the planning instance.

Only Changed Items

Select during regenerative select or net change processes to update quantity on hand for only those items that had demand or supply added or deleted.

Load Planning Instance - Orders/Forecast: Forecasts Page

Use the Load Planning Instance - Orders/Forecast: Forecasts page (PL_LOAD_OPT_REQ3) to define supply and demand forecast type parameters.

Navigation

click the Forecast link on the Load Planning Instance - Orders/Forecast: Orders page

Forecast Source

Values are:

- *Forecast Sets*: Select to include processing that is associated with item forecast sets from PeopleSoft Inventory or product forecast sets from PeopleSoft Order Management. Do not select this value to disable the processing that is associated with forecast sets.
- *Published Forecasts*: Select to include processing that is associated with forecasts for PeopleSoft Publish Forecast tables in Advanced Planning. Data for these forecasts originates in Demantra Demand Management. Do not select this value to disable the processing that is associated with published forecasts.

- *No Forecast*: Select to disable the processing that is associated with forecasts.

See "Understanding Demantra Integration" (PeopleSoft FSCM 9.2: Supply Chain Management Integration).

Forecast Set

Specify the forecast set to use for the planning session. Forecast sets are not used when you are loading published forecasts.

You can define different versions of forecasts for PeopleSoft Supply Planning. For example, you might select *OPTIMISTIC* and *LIKELY* to create two unique forecast sets. For each case, you can define forecast quantities by product or item to create what-if scenarios with different versions of the material and capacity plan based on different forecasts. You can load only one forecast set into a planning instance at one time.

This field is available only when you select Use Forecast Sets.

Weight Profile

Displays the PeopleSoft weight profile that the system uses to convert the item's forecast into daily intervals. The system initially populates this field with the default profile name *ALLDAYS*. You can override this value.

This field is available only when you select Use Forecast Sets.

See "Calendar Weight Profiles Page" (PeopleSoft FSCM 9.2: Supply Chain Management Integration).

Publish Name

Specify the published forecast that you want from PeopleSoft Publish Forecast tables in Advanced Planning. The forecast data comes from Demantra Demand Management.

This field is available only when you select Use Published Forecasts.

Use Latest Published Forecast and Publish Date

Select to use the last set of data that was provided by Demantra Demand Management to PeopleSoft Publish Forecast tables in Advanced Planning. Otherwise, enter a specific date in the Publish Date field.

These fields are available only when you select Use Published Forecasts.

Map ID

Select a map ID. You use map IDs to create a unique collection of data that the system uses to map forecast data fields from PeopleSoft to Demantra Demand Management flat files. During the demand export and forecast import processes, the system uses the map ID to track forecast data that you can select for use with Supply Planning. Map IDs are defined using the Define Field Mappings component in Advanced Planning.

Array, Business Unit Field, Item/Product Field, and Forecast Type

Display values associated to using a published forecast. When you enter a map ID, the system displays the forecast type.

These fields are available only when you select Use Published Forecasts.

Bucket Size

Indicate the size of bucketed time periods to use for forecasting. Select *Daily*, *Weekly*, or *Monthly*. Monthly buckets begin on the first of the month and weekly buckets begin on a Sunday.

Note: Use weekly or monthly buckets, because the forecast is consumed only by orders within the same bucket.

Item/Product Field

Displays the key field when you select to use published forecasts.

Fulfill Fence (days)

Indicate the number of days from the current date that the planning engine uses as the forecast fulfillment time fence.

When a forecasted demand occurs within the time fence and cannot be met entirely, the system cancels the forecast tasks representing portions of the forecast that cannot be met. If the forecasted demand that occurs past the time fence cannot be met entirely, the system delays and rolls forward to future planning buckets (where they can be satisfied) forecast tasks representing portions of the forecast that cannot be met. Solvers determine how many forecast tasks can be satisfied and where to reschedule the unfulfilled forecast tasks. If you do not enter a value in this field, the default is the current date.

Forecast fulfillment is the process that the planning engine uses to manage forecasted demand over a period of time. Forecast fulfillment enables you to divide the total forecast demand into portions based on an item's forecast fulfillment size to meet certain portions of the forecast if the total forecast cannot be met. The planning engine can meet the supply shortage during the same planning bucket in which the shortage occurs or carry it over into the next bucket.

Forecast Load

Select to front-load the forecast and produce demand at the beginning of the forecast period so that the supply must be available at the beginning of the period. If you select the Back Load option, the forecast produces demand at the end of the forecast period so that supply can be scheduled during the period. Front Load is the default option. When forecasted demand cannot be supplied, the solvers look at forecast tasks and how their forecasts were loaded to determine whether forecast tasks are late. When a task is late, the solvers determine whether the task should be delayed or canceled.

Forecast Consumption

Forecast consumption options enable you to control the forecast consumption calculations.

Consumption demands are defined at the business unit item level. Inventory items consume sales orders, quotes, buying agreements, transfers, material stock requests, extra demand, and production. Planning items consume nothing. Each demand transaction's consume forecast attribute flag must be defined as *True* to make the transaction eligible for forecast consumption

Allow Forecast Consumption

Select to indicate that you want PeopleSoft Supply Planning to consume the forecast. If you do not select this option, the solver assumes that forecast values loaded into the planning instance are net forecasts.

Explode Demand for Consumption

Select to consume forecast against production component demand. .

If the primary sourcing option is a production option, the forecast consumption process calculates the component requirements that are necessary to satisfy all of the demands for that item, based on the bills of material. For each component that is marked as consuming forecast against production demand, these requirements are then consumed against the forecasts that are defined for the component. . Do not select the Explode demand for Consumption check box if forecast consumption occurs for customer order demand, extra demand, stock requests, or transfer demand only.

To explode demand for forecast consumption:

1. For the demand order, determine the forecast bucket to which you add the demand based on the target due date.
2. Use the default item sourcing option as the primary way to source the item.
 - For a purchase option, stop the explosion, because the item is sourced externally.
 - For a production option, look at each component of the bill of materials and calculate the required quantity. To calculate the quantity, multiply the quantity per assembly by the order quantity. If the component is marked as consuming production demand, this quantity is consumed against the component's forecast. For each component that is marked to explode for consumption, repeat this step using the component required quantity.
 - For a transfer option, check the item in the sourcing business unit. If it is marked to explode for consumption, repeat this step using the order quantity.

Stock Request Shipments

Select if you want shipped stock requests loaded into the planning instance to consume forecast.

Transfer Demand Shipments

Select if you want shipped transfer orders that were already received by the destination business unit loaded into the

	planning instance to consume forecast in the source business unit.
Sales Order Shipments	Select if you want shipped sales orders loaded into the planning instance to consume forecast.
Consumption Sequence	Indicate whether consumption should occur before or after the proration to PeopleSoft Supply Planning forecast buckets. This field is valid only if bucketed forecasts are using published forecasts.

Maintaining Planning Engines

The Planning Engines component enables you to bring a planning instance into memory (start a planning engine), check the status of the planning engine, and remove the planning instance from memory when you have finished planning for the planning instance (stop the planning engine).

This topic discusses how to maintain planning engines.

Pages Used to Maintain Planning Engines

Page Name	Definition Name	Usage
<u>Planning Engines - Planning Engine Page</u>	PL_PROBINST_MAINT	Start, stop, and view the status of a planning engine that is associated with a specified planning instance.
Planning Engines - Tracing	PL_PROBINST_TRACE	Use this page only if asked to do so by authorized PeopleSoft personnel. Adding values to fields on this page does not change the planning solution, but might significantly slow down the creation of a plan.
<u>Planning Engine Domains Page</u>	SPL_DOMAIN_LIST	Review planning engine domains to determine available domains on which to load a planning instance, and to determine on which domain a planning instance is loaded.

Planning Engines - Planning Engine Page

Use the Planning Engines - Planning Engine page (PL_PROBINST_MAINT) to start, stop, and view the status of a planning engine that is associated with a specified planning instance.

Navigation

Supply Planning > Create Plan > Planning Engines

Status	Displays the status of the Load Planning Instance process for the corresponding planning instance ID or the last major data exchange that occurred for the planning instance.
Start Planning Engine	Click to start the planning engine for the corresponding planning instance.
Shut Down Planning Engine	Click to stop the planning engine for the corresponding planning instance.
Check Planning Engine Status	Click to determine whether the planning engine is loaded for the corresponding planning instance. The system displays a text message in the Return Message field.
Return Message	<p>The system displays information in this field when you click the Start Planning Engine button, the Shut Down Planning Engine button, or the Check Planning Engine Status button.</p> <p>For example, when you click the Start Planning Engine button, the system might display a message indicating that the planning engine is being started. If you click the Check Planning Engine Status button, the system might display a message indicating that an error has occurred (when appropriate).</p>

Planning Engine Domains Page

Use the Planning Engine Domains page (SPL_DOMAIN_LIST) to review planning engine domains to determine available domains on which to load a planning instance, and to determine on which domain a planning instance is loaded.

Navigation

Supply Planning > Create Plan > Planning Engines Domains

Refresh Domain List	Click to update the page and display the current status of all the domains that are listed. If you do not click this button, the system displays the status current at the time you first accessed this page.
Default	The system populates this option if the domain is defined as the default domain on the Planning Engine Domains page.
URL	Displays the URL for the corresponding domain, which normally represents a physical computer.

Maintaining Planning Instances

This topic provides an overview of planning instance maintenance and lists the pages that are used to maintain planning instances.

Pages Used to Maintain Planning Instances

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Copy Planning Instance Page	PL_COPY_PI_REQ	Copy a source planning instance to a new or existing target planning instance. Understanding Planning Instance Maintenance
Delete Planning Instance Page	PL_DEL_PI_REQ	Delete a planning instance and elect to remove or preserve the corresponding planning instance definition and security. Understanding Planning Instance Maintenance

Understanding Planning Instance Maintenance

PeopleSoft Supply Planning enables you to copy and delete planning instances.

Planning Instance Copies

When you copy a planning instance, you can enter a new value into the Target Planning Instance field to create a new planning instance definition or enter an existing planning instance to refresh with data from the source planning instance.

When copying planning instances, consider that:

- If planning instance user-level security is in effect, you can access only those target planning instances that you created, pending expansion of security by an administrator.
- You must enter a valid source planning instance.
- The system deletes in its entirety and regenerates the target planning instance.
- If the target planning instance is loaded into the planning engine, the system stops the process and requires removal of the planning instance from the planning engine before copying.
- You can produce one copy of a planning instance at a time.

You cannot make multiple target copies from one source planning instance during a single run.

- The system deletes the Extra Demand table from existing target planning instances; PeopleSoft Supply Planning does not retain this data.

Planning Instance Deletions

When deleting planning instances, consider that:

- The system deletes data from tables that are keyed by planning instance only.
- Staging tables resulting from the Post Updates process that are pending transaction system approval are not affected.
- You can delete only one planning instance at a time.

- If the system loads the target planning instance into the planning engine, it stops the process and requires removal of the planning instance from the planning engine before deleting.

Reviewing Planning Instances

This topic lists the pages that are used to review planning instance data.

Pages Used to Review Planning Instance Data

Page Name	Definition Name	Usage
Review Planning Instances - Planning Instance	PL_PROBINST_DEF	Review planning instance data.
Review Planning Instances - Text/Policy	PL_PROBINST_DEF2	Review any text messages that are associated with the planning instance. Review the inventory policy information that is loaded into the planning instance.
Review Planning Instances - Dates	PL_PI_DATES	Review dates and time fences that are associated with the planning instance.
Review Planning Instances - Orders	PL_PI_ORDERS	Review supply and demand selection criteria that is loaded into the planning instance.
Review Planning Instances - Forecast	PL_PI_FORECAST	Review forecast setup data that is associated with the planning instance.

Resetting Planning Instance Locks

This topic provides an overview of planning instance locks and discusses how to select locked supply and demand elements.

Page Used to Reset Planning Instance Locks

Page Name	Definition Name	Usage
<u>Reset Planning Instance Locks Page</u>	PL_PROBINST_LOCKS	Select the supply and demand elements that were locked by the Load Planning Instance process.

Understanding Planning Instance Locks

PeopleSoft Supply Planning locks the planning instance data tables at the beginning of the Load Planning Instance process to prevent two processes from updating the same subset of the planning instance concurrently. It releases the locks only if the process terminates normally. If the process terminates, when the reason for the error is corrected, you can run the failed job in restart mode. When the job finishes

successfully, the system releases the locks. If you do not restart the failed job, you must release these locks manually on the Planning Instance Lock page, where you can also verify that a Load Planning Instance process is not currently running for a planning instance.

Reset Planning Instance Locks Page

Use the Reset Planning Instance Locks page (PL_PROBINST_LOCKS) to select the supply and demand elements that were locked by the Load Planning Instance process.

Navigation

Supply Planning > Create Plan > Reset Planning Instance Locks

Note: You should not need to change the status of these locks unless an external event occurred that caused an unforeseen failure to the Load Planning Instance process (PL_LOAD_OPT).

Status	Displays the status of the Load Planning Instance process for the corresponding planning instance ID or the last major data exchange that occurred for the planning instance.
Lock Status	The system populates these options to indicate that the corresponding object type is currently being transferred to the planning instance. Normally, the system populates one at a time, unless you are running the Multiprocess Opt Table Load process to load data into the planning instance. If the Load Planning Instance process finishes successfully, no options are selected.

Verifying PeopleSoft Supply Planning Data

The Planning Data Inconsistency Report (PLS3001) enables you to identify items to be planned and validates the items that are currently planned.

This topic provides an overview of the Planning Data Inconsistency report and discusses how to create the Planning Data Inconsistency report.

Page Used to Verify PeopleSoft Supply Planning Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Inconsistency Report Page</u>	RUN_PLS3000	Create the Planning Data Inconsistency report.

Understanding the Planning Data Inconsistency Report

Using the Planning Data Inconsistency report (PLS3001), you can:

- Verify that the master plan items have only master and material components.

- Verify that material items have only material components.

Note: If the two preceding conditions are violated, the system does not bring the assembly and component relationship into the optimization tables when you run the Load Planning Instance process.

- Identify the item and production areas that have no valid routing.

You cannot place a planned order against an area and item combination.

- Identify the routings that have no item and production areas.

The Post Updates process (PL_POST) produces an error message when this condition exists for a planned order.

- Report routings that have no planning times.

The system does not bring these routings or their related sourcing options into the optimization tables.

- Identify items with no associated sourcing templates.

- Identify missing reference routing items.

You can identify items for which the system will not bring the reference routing item into the planning instance, based on the selection criteria that you specified for this report.

- Identify potential sourcing options with yields defined as zero.

Although you cannot define a yield as 0 in PeopleSoft Supply Planning, you can import a yield defined as 0 from an external system. PeopleSoft Supply Planning treats yields defined as 0 as equal to 100 percent.

Note: When specifying search criteria on the Inconsistency Report page, do not populate a field if you intend to search for all of the possible values of the field.

Inconsistency Report Page

Use the Inconsistency Report page (RUN_PLS3000) to create the Planning Data Inconsistency report.

Navigation

Supply Planning > Create Plan > Inconsistency Report

Planning Instance

Select a planning instance ID. If you populate this field, the system populates the other request parameters on this page based on the defaults that are associated with the corresponding planning instance ID.

Related Links

"Define Business Unit Item - Planning: General Page" (PeopleSoft FSCM 9.2: Managing Items)

Generating Plans for PeopleSoft Supply Planning

Understanding the Plan Generation Process

After you run the Load Planning Instance process (PL_LOAD_OPT) to define the planning model, you can generate a plan using the Initiate Solver component for the solver that you want to use. You can rerun any of the solvers after you have made manual changes to the plan using the Material Workbench or Capacity Workbench.

Before you generate a supply plan, ensure that you have a planning instance defined and loaded into a planning engine that you use to create the plan. Generating the plan can be an iterative process. You can run a plan multiple times to create a higher-quality plan. When you initially define the model, PeopleSoft Supply Planning passes the data that you identify as part of the planning process to the planning engine using the Load Planning Instance process. If the data is incomplete (for example, if the forecast numbers are inaccurate or if a time fence is set up improperly), stop the generation process and use the transaction system to correct incomplete or incorrect data. You can change plan data using the planning engine; however, only planned orders, order cancellations, and date changes are transferred back to the PeopleSoft transaction system.

Solvers

When you generate a material plan in PeopleSoft Supply Planning, you choose from a series of solvers. Solvers are flexible tools that analyze data and attempt to find feasible plans (based on the business planning needs) that contain no material shortages or capacity violations. Material feasibility indicates that the longest cumulative lead time exists within a manageable time frame in which no material shortages exist. Capacity feasibility indicates that no critical capacity violations exist for aggregate resources that are marked for repair in the planning time period. In addition to producing material and capacity feasible plans, solvers identify and report unavoidable instances in which the plan is jeopardized, for example, when material cannot be sourced or when insufficient lead time is available to satisfy a demand.

Using solvers, you first produce a plan based on existing supply and demand for an item to arrive at a feasible material and capacity plan. Then you manually repair infeasibilities and run more comprehensive solvers to create a plan that is ready to use when it is generated.

Time Fences

PeopleSoft Supply Planning uses fences to place boundaries on the magnitude of the planning problem, to restrict the behavior of the solvers during certain time periods, and to automate certain conditions at certain times. Solvers use fences to determine how far supply or demand tasks can be moved forward or backward to meet planning needs. You can use time fences to help determine how solvers analyze supply and demand.

Use these time fences when running PeopleSoft Supply Planning solvers:

Start of Time

Represents the beginning time boundary for the planning instance. PeopleSoft Supply Planning solvers do not recognize orders or changes before this date. Used with the end of time, the region defines the time period within which the system recognizes orders and changes. The start of time must be equal to or prior to the current date time.

Early Fence

Represents the beginning time of the interval within which solvers process the elements of the material and capacity feasible plans. The early fence must be greater than or equal to the current time and less than the end of time. Usually, you set the early fence to the current date.

Both a global early fence value (for the entire planning instance) and an item-specific early fence value exist.

Prior to the early fence, solvers cannot:

- Create any new supply with a start time before the early fence.
- Reschedule current tasks that have a start time before the early fence.
- Reschedule existing tasks starting after the early fence to start before the early fence.
- Cancel current tasks that have a start time before the early fence.

Note: The early fence provides a boundary before which solvers cannot move tasks. As a general rule, the region before the early fence is frozen to the planning solvers.

Current Time

Represents the current date and time. Each planning instance has a base date and time that is equal to the current date and time to which all of the other fences and horizons are specified as offsets. Current date and time is unrelated to the actual (or system date time), except when you use the actual date and time as a default for specifying the current date and time.

Capacity Fence

Represents the date and time that solvers begin ignoring capacity violations. After this date, the Feasible solver ignores violations.

In plan analysis, solvers do not report or include any capacity type exceptions that occur after the capacity fence. The capacity fence must have a value between current time and the end of time. If you define the capacity fence as current time, the solvers ignore all of the capacity violations. The capacity fence default value is the end of time.

Late Fence

Use the late fence as a reporting fence only. Exceptions that occur after the late fence are not included in any metric when analyzing plan quality.

The late fence must be greater than the early fence and equal to or prior to the end of time. The late fence default value is end of time.

Note: All solvers net supply and demand and create new supplies through the end of time.

End of Time

Represents the concluding time boundary. PeopleSoft Supply Planning solvers do not recognize orders or changes after this date.

The end of time must be at or after the current date and time.

Planning Conditions and Time Fences

Each solver processes planning conditions in conjunction with time fences. You also maintain tasks within time fences. This table lists how PeopleSoft Supply Planning solvers address planning conditions. The last column indicates whether manual rescheduling is available for the corresponding condition:

<i>Planning Conditions</i>	<i>Material Solver</i>	<i>Feasible Solver</i>	<i>Manual Rescheduling</i>
Reschedule tasks before early fence.	No	No	Yes
Move orders before early fence.	No	No	Yes
Create new orders before early fence.	No	No	NA
Respect late fence.	No	No	No
Recognize violations before early fence.	NA	No	NA
Respect capacity fence.	NA	Yes	No
Beginning fence and ending fence boundaries.	Early fence and end of time	Early fence and end of time	Start of time and end of time

Time Buckets

Capacity plans are created in bucket sizes that are associated with each aggregate resource. Material plans that are generated by the Material solver and Feasible solver are based on time-phased netting of demands and supplies.

Item Substitution

You can predefine valid alternatives for an item when that item (the item that is used as a component in a production order) is unavailable. When using substitute items with PeopleSoft Manufacturing, PeopleSoft Supply Planning automatically suggests the substitute item when the original is in short supply or is unavailable.

You can define substitutes for an item on the Item Definition and Item Attributes by Unit pages and use them as defaults when maintaining components on a bill of material (BOM). When defining substitutes, you can specify effectivity dates and conversion factors. The conversion factor defines how many of the substitute is required to replace the original item. You can set a priority by which the substitute item with the highest priority (the substitute with the lowest priority number) is substituted first in PeopleSoft Supply Planning.

You can define general substitution options for each manufacturing business unit when you establish business unit group definitions in PeopleSoft Supply Planning.

Additionally, to enable the solvers to substitute for items, select the Allow Item Substitution option on the Initiate Feasible Solver page. When the projected quantity on hand of the primary item cannot meet the demand, the Feasible Solver can use substitutions when creating new planned production, if these criteria are met:

- You selected the Allow Item Substitution option on the business unit group definition.
- You selected options for allowing substitutions during the running of the corresponding solver.
- No partially completed operations exist for the item.
- Items have not been issued for the operation.
- Item Substitution is not frozen for the order.

You can select the Frozen option for substitutions on the Refine Plan component for planned production orders and scheduled production orders. The mass maintenance utility also allows for component substitutions to be frozen. When a production ID or production schedule is marked as being frozen for substitutes, no substitution will be performed.

Solvers use substitutions for dependent demand only. They do not use substitutions for end items, such as sales orders, transfers, or forecasts. Solvers consider substitute items (all of the items that are effective for the period considered) according to the order of their priority.

Note: PeopleSoft Supply Planning assigns higher low-level codes to substitute items than to primary items. This ensures that primary items are planned before substitute items.

The substitute item projected quantity on hand must meet the total demand of the substitute item quantity that is needed for each primary item multiplied by the conversion factor. The solvers do not use partial substitutions. If the solvers cannot meet this demand with substitutions, they plan supply for the primary item.

Note: PeopleSoft Supply Planning solvers use valid substitutions only. However, PeopleSoft Supply Planning does not validate substitutions that are made within the transaction system and loaded into the planning instance tables.

Note: The Material solver performs substitutions only when a component is beyond its phase-out date and dependent demand exists for the component.

Production End Dates

Solvers determine the start and end dates for production by forward scheduling from the start date or backward scheduling from the due date. In most circumstances, solvers use backward scheduling; however, if not enough lead time is available for materials, or if no capacity is available and the order might be delayed, solvers use forward scheduling to find the earliest availability date for the production outputs. If a work center calendar exists for an operation, solvers validate the operation start and end dates against this calendar. If the work center calendar does not exist for an operation, PeopleSoft Supply Planning uses the business unit calendar for operation date validation.

To calculate start and end dates for production, solvers use this information:

- Operation start and operation end quantity.
- Component quantity based on the operation start quantity.
- Output quantity based on the operation end quantity.
- Effectivity dates for the components.
- Substitutions for the components.
- Offset lead time for send ahead and intransit.
- Load start offset (the duration between the operation start time and the net start time).

Solvers calculate this number for existing production IDs.

In addition to the production start and end times, the scheduling algorithms provide the solvers with this information:

- Operation start and end time.
- Components (their required quantity and any substitutions, if checking for material capacity).

For existing production IDs and for planned production, solvers validate the operation dates against the work center or business unit calendar only.

Related Links

[Displaying Item Useup Information](#)

Common Elements Used to Understand the Plan Generation Process

Allow Item Substitution

Select to enable the Feasible solver to use substitute items to correct material inversions. When you select this option, the solver tries to reallocate the supply of a valid substitute item

from the bill of materials. If you do not select this option, the solver makes no substitutions during solver processing.

Allow Rescheduling

Select to enable the Feasible solver to reschedule tasks when resolving late supply violations.

Note: You must select Allow Rescheduling to ensure a feasible capacity plan during plan processing. In case of frozen demand, the supply is scheduled earlier if the demand cannot be made on time. In all other cases, the default behavior schedules the demand later.

Calculate Low Level Codes

Select to verify the accuracy of low-level codes. When you select this option, the system calculates the low-level code for each item prior to the solver run.

Low level codes are numbers that identify the lowest level in a BOM at which a component appears. These codes are maintained on items and calculated by the planning engine.

PeopleSoft Supply Planning explodes the demand for an item by level code, from top to bottom until all of the demand is exploded, then creates supply for all of the exploded demand.

The system assigns level code to each item in the structure.

Items that are assigned at the top level code are those that are highest on the supply chain, those normally shipped to the customer, and are denoted as level 0. Items with larger level code numbers exist at a lower level in the product structure.

Note: Solvers plan items in low-level code order. Ensure that the low-level code that is associated with each item is accurate before you run a solver, especially if you have made BOM changes.

Reconsume Forecast

Select to reconsume the forecast.

The system consumes forecast when you load the model into memory the first time. However, if you add more demands to the model on any of the Refine Plan components, you might need to reconsume these demands.

Start Planning Engine and URL

Select to start the planning engine for the corresponding planning instance prior to running the solver. If the planning engine is already running, the system ignores this option and uses the domain on which the planning engine is currently running to run the solver. If you select Start Planning Engine and the planning engine is not currently running, the system starts the planning engine for the corresponding planning instance using the domain that you specify in the URL field. If you specify no domain, or if the planning engine fails to start on the domain that you specify in the URL field, the system

uses the default URL that you define on the Planning Engine Domains page.

Violation Count Collection

Select Pre-Solver Violations and Post-Solver Violations to save violation counts before and after a solver runs. You cannot specify filters.

Running the Material Solver

This topic provides an overview of the Material solver and discusses how to define the Material solver.

Page Used to Run the Material Solver

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Material Solver Page</u>	PL_MRP_SOLVE	Define material planning options and run the Material solver.

Understanding the Material Solver

The Material solver creates a simple material plan to give an accurate picture of the lead time and materials that are necessary to satisfy all of the top-level demands. It creates supplies just in time to satisfy the demand. Material planning handles supply tasks on a first-come, first-served basis. Before it creates any new planned orders, the solver reschedules nonfrozen supplies or uses existing orders. It creates new supplies only after it uses all of the existing nonfrozen supplies and the demands remain unmet. The Material solver uses existing supply or creates supply for all of the demands in the system. If the demand is beyond the phase-out date, the solver does not create new supplies for the item.

The Material solver has a tolerance setting where a late supply is acceptable for a certain number of days. The 'Tolerance' for lateness can be specified for an item in calendar days starting from 0 (default value) up to a maximum of 999 days. If supply order falls inside specified window, existing supply order is considered first before any new supply orders can be created. The Tolerance window Reschedule Tolerance is available under the Solvers link on the Planning tab of the Business Unit/Item attributes page.

You can run the Material solver in regenerative or net change mode. In regenerative mode, the solver considers all of the items. In net change mode, the solver considers only those items with violations, items with a negative quantity at any point at or after the early fence.

This solver uses an item histogram to check for negative projected on-hand quantity at any point. A negative projected on-hand quantity can result from new demands, deleted supply, or unmet demand from the previous run. The Material solver creates planned supplies to meet negative quantity.

If lead time for a planned order pushes the start date before the early fence, the planned order will be scheduled to begin at the early fence. This may result in material shortages for both dependent and independent demands.

Additionally, the Material solver:

- Sorts all items in low-level code order.

The Material solver solves for items in the level-code order starting with the lowest-level code. Higher assemblies have lower-level codes.

- Deletes all of the nonfrozen planned supplies for the item that is being planned
- Sorts all of the demands—sales orders, production components, transfers, forecasts and safety stock, material stock request, and end demand—by target date.

The solver then matches supply and demand, starting with the quantity on hand. The Material solver sums all of the demands that occur at the same time.

- Sorts all of the supplies-POs, planned POs, production orders, planned production, and transfers—by date.
- Moves existing nonfrozen supplies.
- Creates supplies to meet demands.
- Cancels remaining nonfrozen supplies.

Note: The Material solver does not consider capacity.

Sourcing Options

The Material solver uses the default sourcing option only, and considers no alternate sourcing options. If the sourcing option is not effective or no default sourcing option is defined, the demands for the item are not met.

Negative Quantity On Hand

First, the Material solver satisfies negative quantity on hand, moving enough supplies to meet the negative quantity on hand. For example, it moves supplies occurring later than the early fence of the item as close to the early fence as possible, and when the total supply quantity that is moved does not satisfy the quantity on hand, it creates new supplies as close to the early fence as possible.

Fixed Periods

The Material solver includes an algorithm that determines the maximum amount that is needed between the first demand and a fixed period amount of time after all of the existing orders have been used. The fixed period is defined as a number of days on the item record. The solver consolidates demands (including safety stock) for the item for a fixed period number of days and creates a single supply.

The Material solver considers the fixed period while planning new supplies only (it does not consider the fixed period when using existing supplies). The fixed period quantity is equal to the sum of all of the demand quantities in the fixed period, plus the maximum safety limit in that period.

Material Solver Page

Use the Material Solver page (PL_MRP_SOLVE) to define material planning options and run the Material solver.

Navigation

Supply Planning > Solve Plan > Initiate Material Solver

Image: Material Solver Page

This example illustrates the fields and controls on the Material Solver Page . You can find definitions for the fields and controls later on this page.

Run

Click to generate a material plan using the PeopleSoft Process Scheduler.

Planning Instance

Select a planning instance. Planning instances IDs define a complete set of data analyzed to create a material supply plan

Solver Settings

Planning Mode

Values are:

Regenerative: The Material solver plans for every item in the model. The solver deletes all of the planned orders before planning for each item.

Net Change: The Material solver replans only those items that are marked to be planned, only items with violations (items with negative quantity at any point at or after the item's early fence). The solver uses an item histogram to check for projected on-hand quantity at any point. Projected on-hand quantity can become negative as a result of new demands, if supplies are deleted, or if the demand is not satisfied from the previous run. The Material solver considers no new supplies in net change mode (it does not reschedule new supplies to meet new demands), and creates only planned supplies to meet negative quantity.

Safety Stock Option

Specify how you want the solver to plan for safety stock levels. Select *Ignore* to ignore safety-stock constraints. Use this value for what-if scenarios.

Select *Ignore Prior to First Demand* if you want the solver to ignore safety stock demands prior to the first demand.

Select *Fulfill* if you want the solver to plan supply for safety-stock demand as early as possible after the item's early fence. This is the default setting.

Note: Once the Planning Instance is selected, the system updates this field with the value on Planning Instance. You can change it at anytime, and save. This new value will remain with the run control, and not copy back to the Planning Instance.

Defer Supplies

Select to indicate that supplies should be moved out later to meet a demand. Generally, supplies are moved earlier to meet demands on time.

Plan By

Use this group box to indicate whether you want the solver to include items that have been defined in the material plan, master plan, distribution plan, or any combination. The solver includes items that are associated with the specified planned-by types only.

Select the Include Distribution Items, Include Master Items, or Include Material Items check box or any combination to items in include in the material plan.

Allow Cancellations

At the start of the solver run, the Material solver deletes planned orders that are not firm and cancels all the excess supplies at the end of the run. You can also use the check boxes in the Allow Cancellations group box to define to the Material solver which orders it can cancel when the supply is not frozen.

The system passes the frozen supply setting from the PeopleSoft Manufacturing system. You can then make the update in PeopleSoft Supply Planning and apply the update back to manufacturing. Frozen orders cannot be cancelled by the Material solver even if the orders are in excess. You can define an order as frozen using pages for each type of order. The system reschedules nonfrozen orders to meet demand on time. If the supplies are frozen and supply cannot be created on time, the system uses late frozen supply. If there is no late supply, then the supply is created in the early fence.

The default value for the check boxes is selected. Click the check box for the type of order or for the firm-planned order that you want to deselect. When you deselect an order, the system deselects the check box and does not allow the cancellation of frozen supplies. Available orders include:

Production Order: Select to allow the cancellation of production orders.

Purchase Order: Select to allow the cancellation of purchase orders.

Transfer Order: Select to allow the cancellation of transfer orders.

Production Order: Select from Production Order statuses for cancellations. The statuses are:

- *Entered*
- *Firmed*
- *In process*
- *Released*

The default is to cancel Production Orders that are excess.

Firmed Planned Production: Select to allow the cancellation of firmed-firmed production. This is a production ID or production schedule that has a quantity, start date, and due date, but the bill of material and routing are frozen and the component and operation lists exist.

Firmed Planned PO: Select to allow the cancellation of firm-planned purchase orders.

Firmed Planned Transfers: Select to allow the cancellation of firm-planned transfers.

Running the Feasible Solver

This topic provides an overview of the Feasible solver and discusses how to define the criteria for initiating the solver run.

Page Used to Run the Feasible Solver

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Feasible Solver Page	PL_FSBL_SOLVE	Define criteria for the Feasible solver.

Understanding the Feasible Solver

The Feasible solver is a search-based solver that uses tree-solver technology to resolve material and capacity infeasible tasks. This solver attempts material feasibility for all of the resolvable material violations between the early fence and end of time fence. If you select the Make Plan Capacity Feasible option, available on the Initiate Feasible solver page, the solver attempts capacity feasibility, as well.

Note: If you have frozen tasks, model errors, or insufficient lead time in the planning horizon, the Feasible solver may encounter capacity or material violations that cannot be resolved. In these cases, the solver identifies unavoidable problems and makes the rest of the plan feasible.

Additionally, the Feasible solver:

- Considers alternate sourcing options.
- Reschedules existing orders that are subject to capacity constraints.
- Meets demand due dates and minimizes lateness.
- Applies priority for important demands to ensure that they are met on time.
- Minimizes excess inventory.
- Generates intuitive, feasible MRP type solutions.

Solver Algorithm

When resolving material and capacity infeasible tasks, the Feasible solver deletes all of the nonfrozen planned supplies and retracts (making the supply invisible to the solver until the solver needs supply) all of the other nonfrozen supplies. This solver reschedules demand to the target date and solves for negative on-hand quantities.

Additionally, the Feasible solver sorts independent demand by demand priority, MRP level, and demand target date. Frozen demands are assumed to have the highest priority. Starting with demand that is defined with the highest priority, this solver attempts to supply all of the demand. If it is unable to find supply, it attempts to reschedule the demand for a later date. Failing that, it adds the demand to an exception list and continues to the next demand priority.

Regenerative and Net Change Run Types

When processing regenerative run types, the Feasible solver deletes all of the nonfrozen planned supplies and considers all of the other nonfrozen supply that is available for use. This solver includes frozen supply in the on-hand quantity total.

When processing net change run types, this solver considers nonfrozen supply as available for use. It includes frozen supply in the on-hand quantity total.

Lot for Lot Items

The solver maintains a pegged chain for lot-for-lot items. A lot-for-lot item is an item in which all of the sourcing options are free of order modifiers (in which supply quantities match demand quantities). When you invoke the solver, it checks any current pegging for consistency and maintains that pegging, modifying the pegging structure only when needed to make the plan material and capacity feasible.

If any supply option for an item contains an order modifier, then the solver does not consider the item a lot-for-lot item. For these items, the Feasible solver creates the pegging based on a first-in, first-out (FIFO) basis. When using the FIFO method, the solver first matches demands with the highest demand priority to the available supply.

Supply

The Feasible solver obtains supply in this order:

1. By rescheduling and using an available existing supply.

For lot-for-lot items, this solver uses existing supply only if an exact supply and demand quantity match exists.

2. By creating new supply using the sourcing template.

If in this process it creates new, dependant demand, it solves for this demand.

3. By using available quantity on hand when it is unable to create supply.

For lot-for-lot items, this solver uses quantity on hand only if enough quantity on hand is available to meet the full demand quantity.

Post-Solver Phases

The Feasible solver performs these post-solver Run Lateness and Stock Phase Option processes:

- Attempts to minimize permanent excess.
- Reduces WIP and solves for safety stock.

This phase enables the Feasible solver to maintain the feasibility of the schedule, while searching for opportunities to reduce excess inventory that occurs between the early fence and end of time fence, and to search for opportunities to satisfy unfulfilled safety-stock requirements.

- Performs lateness reduction phase.

This phase maintains the feasibility of the schedule while searching for opportunities to reduce the lateness of demands that have been delayed past their due date. These opportunities can exist due to gaps left behind in capacity or when alternate build options are defined in the model using different bills of material.

Late Supply Calculations

When the Feasible Solver cannot supply on-time quantities for top-level demand which is ordered by demand priority, item low-level code and due date and time, it:

1. Attempts to use available planned on-hand quantity that's not allocated to other demand or safety stock.
2. For the remaining demand quantity that's not covered by the first step, attempts to use existing supplies including purchase orders, production process IDs, and transfers.

The order in which the solver selects the supplies is based on the current planned due date and time of the orders. If the selected purchase order, production process, or transfer has a start date and time after the early fence and if the supply is late for the demand, the solver attempts to reschedule it to start at the early fence. The system does not reschedule supplies that start at or before the early fence.

If a transfer order or a production order is selected, the solver checks the order's demand. The solver first attempts to use the available planned on hand quantity, similar to the process described in step 1, to cover the dependent demand. Then, the solver attempts to use existing purchase orders for the demand, similar to the process described in step 2, but the solver does not use existing production ID or transfer supplies. If there is still remaining demand quantity, the solver attempts to create planned supplies using default sourcing options described in step 4.

3. If there is still remaining demand quantity not covered by step 2, you can select the Transfer Network Onhand check box in the Feasible Solver to indicate that you want to create planned transfers.

Using this functionality, the system creates planned transfers for each transfer option on the sourcing template, ordered by sourcing template priority. The planned transfer is created with the available planned on hand quantity if there are any from the source business unit, starting at the early fence of the source business unit and item. If the available on hand at the source business unit is more than the demand quantity, the solver transfers up to the demand quantity. If the supply is not enough to cover the demand, the solver continues to the next transfer option on the sourcing template until the demand quantity is fully covered or all transfer options are exhausted.

4. If there are still remaining demand quantity after step 3, the solver attempts to create planned supplies using the default sourcing option.

If there is dependent demand created, such as in the case of planned transfer or production, the solver explodes down each level of the supply chain. For each lower-level dependent demand the solver attempts to use available planned on hand quantity first, then it attempts to use existing purchase orders similar to process described in step 2, but the solver does not use existing production process ID or transfer supplies. If the dependent demand quantity is still not satisfied, the solver creates planned supplies using the default sourcing option.

5. Finishes the first top-level demand and advances to the next demand by repeating steps 1 to 4.

Feasible Solver Page

Use the Feasible Solver page (PL_FSBL_SOLVE) to define criteria for the Feasible solver.

Navigation

Supply Planning > Solve Plan > Initiate Feasible Solver

Image: Feasible Solver Page

This example illustrates the fields and controls on the Feasible Solver Page. You can find definitions for the fields and controls later on this page.

Feasible Solver

Run Control ID APX1100_AP92 Report Manager Process Monitor **Run**

*Planning Instance ☐ Start Planning Engine

URLID

Violation Count Collection

☐ Pre-Solver Violations ☐ Post-Solver Violations

Solver Settings

*Planning Mode ☐ Calculate Low Level Codes

*Safety Stock Option ☐ Reconsume Forecast

Feasibility Options

☐ Allow Item Substitution ☐ Allow Alternate Routing ☒ Make Plan Capacity Feasible

☐ Allow Rescheduling ☐ Run Lateness Phase ☐ Transfer Network Onhand

Allow Cancellations

☒ Firmed Planned PO ☒ Firmed Planned Transfer ☒ Firmed Planned Production

☒ Purchase Order ☒ Transfer Order

Production Orders

☒ Entered
☒ Firmed
☒ In Process
☒ Released

Navigation Buttons: Save, Return to Search, Previous in List, Next in List, Notify, Add, Update/Display

Solver Settings

Planning Mode

Values are:

Regenerative: Before you run the feasible solver, all nonfrozen planned orders are removed from the planning instance, all independent demands are moved back to their original target dates, and the solve is initiated.

Net Change: All supplies are retained and renetted against all demands in the model.

Safety Stock Option

Select one of these values:

- *Fulfill:* Select to plan for safety stock demand as early as possible after an item's early fence. This is the default setting.

- *Ignore*: Select to ignore safety stock constraints. When you select this value, the Material solver does not plan for meeting safety-stock levels nor does it plan supply for safety-stock demand.
- *Ignore Prior to First Demand*: Select to ignore all of the safety stock constraints that occur prior to the first demand.

Note: Once the Planning Instance is selected, the system updates this field with the value on Planning Instance. You can change it at anytime, and save. This new value will remain with the run control, and not copy back to the Planning Instance.

Feasibility Options

Allow Alternate Routing

Select to enable the Feasible solver to attempt to use additional means of supply as defined on the sourcing template to resolve infeasibilities. The Feasible solver attempts to use alternate purchases, transfers, or production options to resolve a material infeasibility before it tries to reschedule the demand or supply. Select this option if you want the solver to use alternate routings when you also select the Run Lateness/Stock Adjust Phase option.

Run Lateness Phase

The Reduce Lateness Phase is a post process that performs a search to determine all of the possible methods to source the end item and meet the end demand on time. It considers late demands in priority order, working on intolerably late orders first. It attempts to meet the demand on time. If it cannot, it attempts to meet the demand as close as possible to the due date. Failing that, it attempts to reduce the lateness of the order as much as possible.

The stock adjustment phase attempts to reduce temporary excess by scheduling supplies just in time for their demands while maintaining capacity. In addition, it attempts to restore any missed safety stock periods by scheduling late any demands that are a lower priority than safety stock.

Make Plan Capacity Feasible

Select to indicate that you want the Feasible solver to resolve capacity violations between the early fence and capacity fence. If you do not select this option, the solver considers only material feasibility, not capacity feasibility, when you run the plan.

Note: The Feasible solver resolves aggregate resource violations, not detailed resource violations.

Transfer Network Onhand

Select to indicate that you want to create planned transfers with the available planned on-hand quantity if there are any from the source business unit, starting at the early fence of the source business unit and item. This option is run for each transfer

option on the sourcing template in the order of the sourcing template priority.

If the available on hand at the source business unit is more than the demand quantity, the system only transfers up to the demand quantity. If the supply is not enough to cover the demand, the system continues to the next transfer option on the sourcing template until the demand quantity is fully covered or all transfer options are exhausted.

Allow Cancellations

At the start of the solver run, the Feasible solver deletes planned orders that are not firm and cancels all the excess supplies at the end of the run. You can use the check boxes in the Allow Cancellations group box to define to the feasible solver which orders it can cancel.

The system passes the frozen supply setting from the PeopleSoft Manufacturing system. You can then make the update in PeopleSoft Supply Planning and apply the update back to manufacturing.

The default value for the check boxes is selected. Click the check box for the type of order or for the firm-planned order that you want to deselect. When you deselect an order, the system deselects the check box and does not allow the cancellation of frozen supplies.

The default value for the check boxes is selected. Click the check box for the type of order or for the firm-planned order that you want to deselect. When you deselect an order, the system deselects the check box and does not allow the cancellation. Available orders include:

Production Order: Select to allow the cancellation of production orders.

Purchase Order: Select to allow the cancellation of purchase orders.

Transfer Order: Select to allow the cancellation of transfer orders.

Production Order: Select from Production Order statuses for cancellations. The statuses are:

- *Entered*
- *Firmed*
- *In process*
- *Released*

The default is to cancel Production Orders that are excess.

Firmed Planned Production: Select to allow the cancellation of firmed-firmed production. This is a production ID or production schedule that has a quantity, start date, and due date, but the bill of material and routing are frozen and the component and operation lists exist.

Firmed Planned PO: Select to allow the cancellation of firm-planned purchase orders.

Firmed Planned Transfers: Select to allow the cancellation of firm-planned transfers.

Running the Forecast Consumption Process

This topic provides overviews of forecast consumption, data extract methods, and forecast allocation and lists the page that is used to run the Forecast Consumption process.

Page Used to Run the Forecast Consumption Process

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Forecast Consumption Page	SPL_FCST_CONSUMP	Define the planning instance against which you want to consume a forecast. If necessary, you can start the planning engine before running the Forecast Consumption process. Understanding Forecast Consumption

Understanding Forecast Consumption

When you create a planning instance, you determine the forecast origins and types that you allocate and consume. The forecast consumption process uses these forecast specifications that you set up during the planning instance creation. Forecast consumption and allocation can consist of as many as four phases. The forecast options that you defined when you set up the planning instance determine order availability and carrying out of these phases. The phases are:

1. Allocation from external time periods into PeopleSoft Supply Planning forecasting time periods.
2. Forecast consumption with actual demands to create a net forecast.
3. Net forecast adjustment to account for deviations of actual demand from forecasted demand.
4. Net forecast breakdown to reduce a large forecast into smaller, more manageable portions.

This table lists the order of these phases when you source forecasts from PeopleSoft Inventory:

<i>Allow Forecast Consumption</i>	<i>Order of Phases</i>
No.	Phase 4 only.
Yes. Consume before proration.	Not Applicable.
Yes. Consume after proration.	<ul style="list-style-type: none"> • Phase 2. • Phase 4.

This table describes the order of these phases when you source forecasts from PeopleSoft Publish Forecast tables that use forecast from Demantra Demand Management:

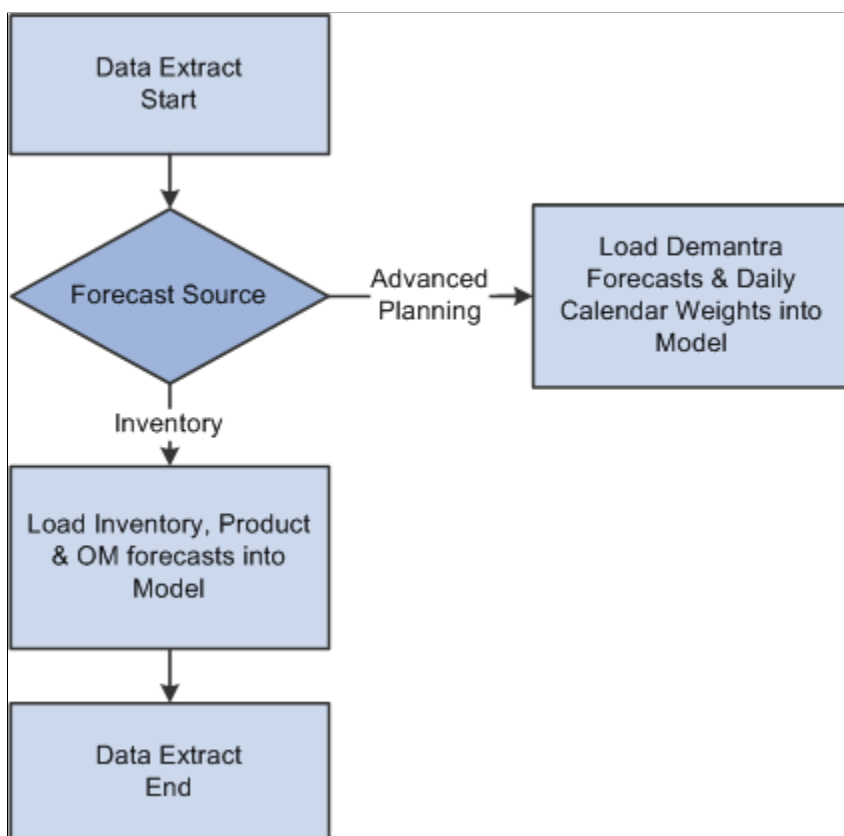
<i>Allow Forecast Consumption</i>	<i>Order of Phases</i>
No.	<ul style="list-style-type: none"> • Phase 1. • Phase 2.
Yes. Consume before proration.	<ul style="list-style-type: none"> • Phase 2. • Phase 1. • Phase 4.
Yes. Consume after proration.	<ul style="list-style-type: none"> • Phase 1. • Phase 2. • Phase 3. • Phase 4.

Understanding Data Extract Methods

This diagram illustrates how PeopleSoft Supply Planning extracts forecast data from demand management and inventory transaction systems:

Image: Extracting forecast data from transaction systems

This diagram illustrates how PeopleSoft Supply Planning extracts forecast data from demand management and inventory transaction systems.

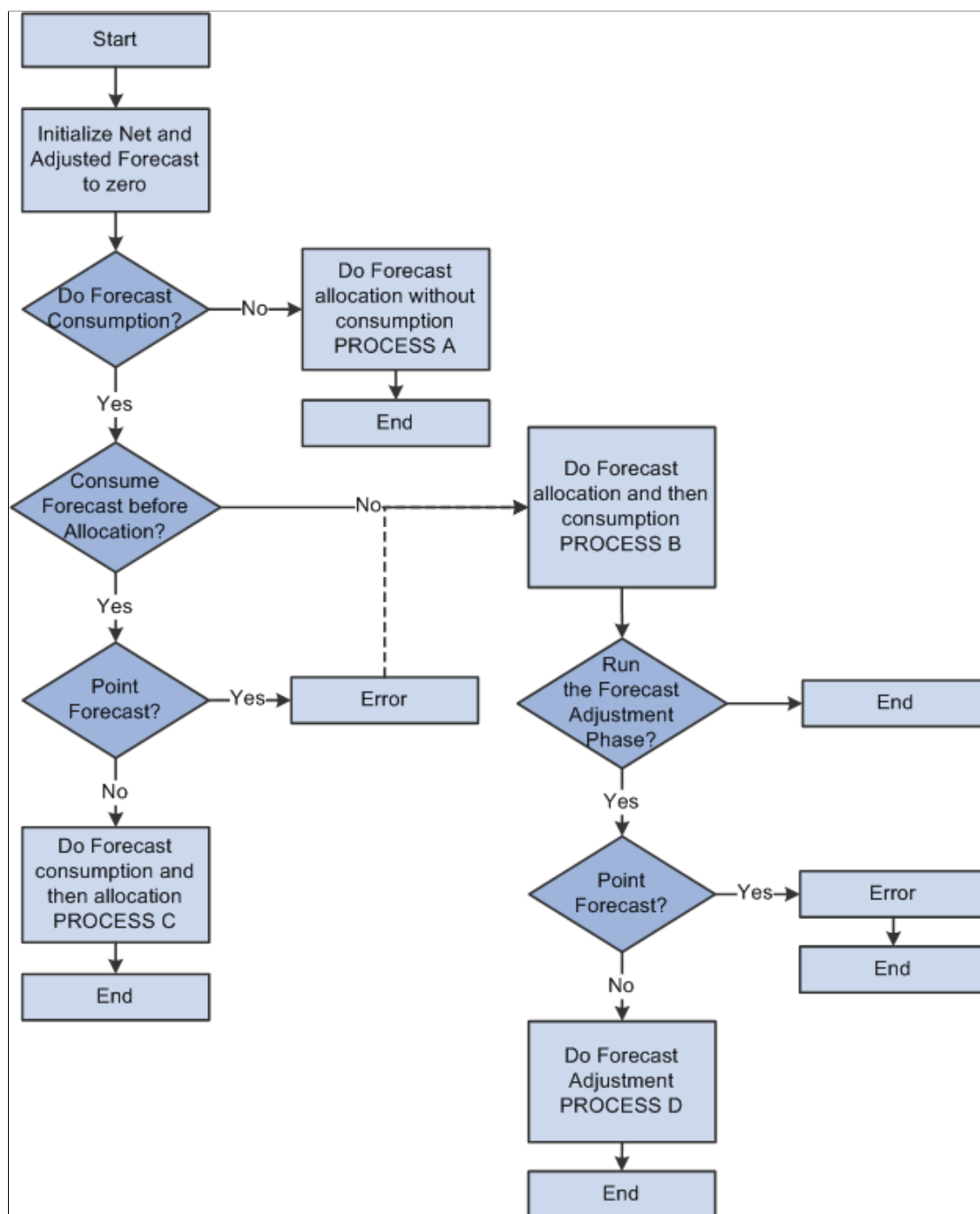


When PeopleSoft Supply Planning completes the initial data extraction, it writes the only bucketed unconsumed forecasts for PeopleSoft Inventory items to the Unconsumed Forecast table (PL_FORECAST_UNC). You can maintain the forecast quantities and daily weights for this forecast under the Refine Plan - Forecasting menu.

This diagram illustrates different scenarios for processing forecasts in PeopleSoft Supply Planning:

Image: Processing forecasts in PeopleSoft Supply Planning

This diagram illustrates different scenarios for processing forecasts in PeopleSoft Supply Planning.

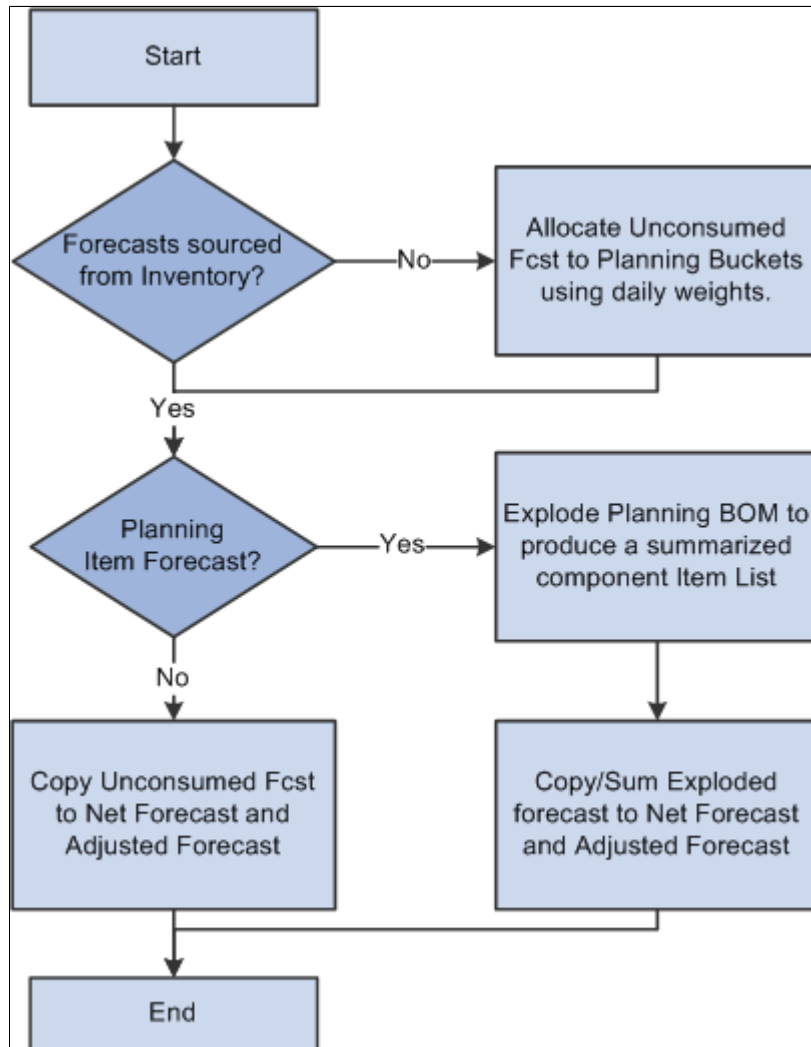


Forecast Allocation Without Consumption (Process A)

If you define a run control to indicate that you do not require forecast consumption, PeopleSoft Supply Planning assumes that the entered forecasts are net forecasts and performs these steps:

Image: Forecast allocation without consumption

This diagram illustrates what steps are performed by PeopleSoft Supply Planning.



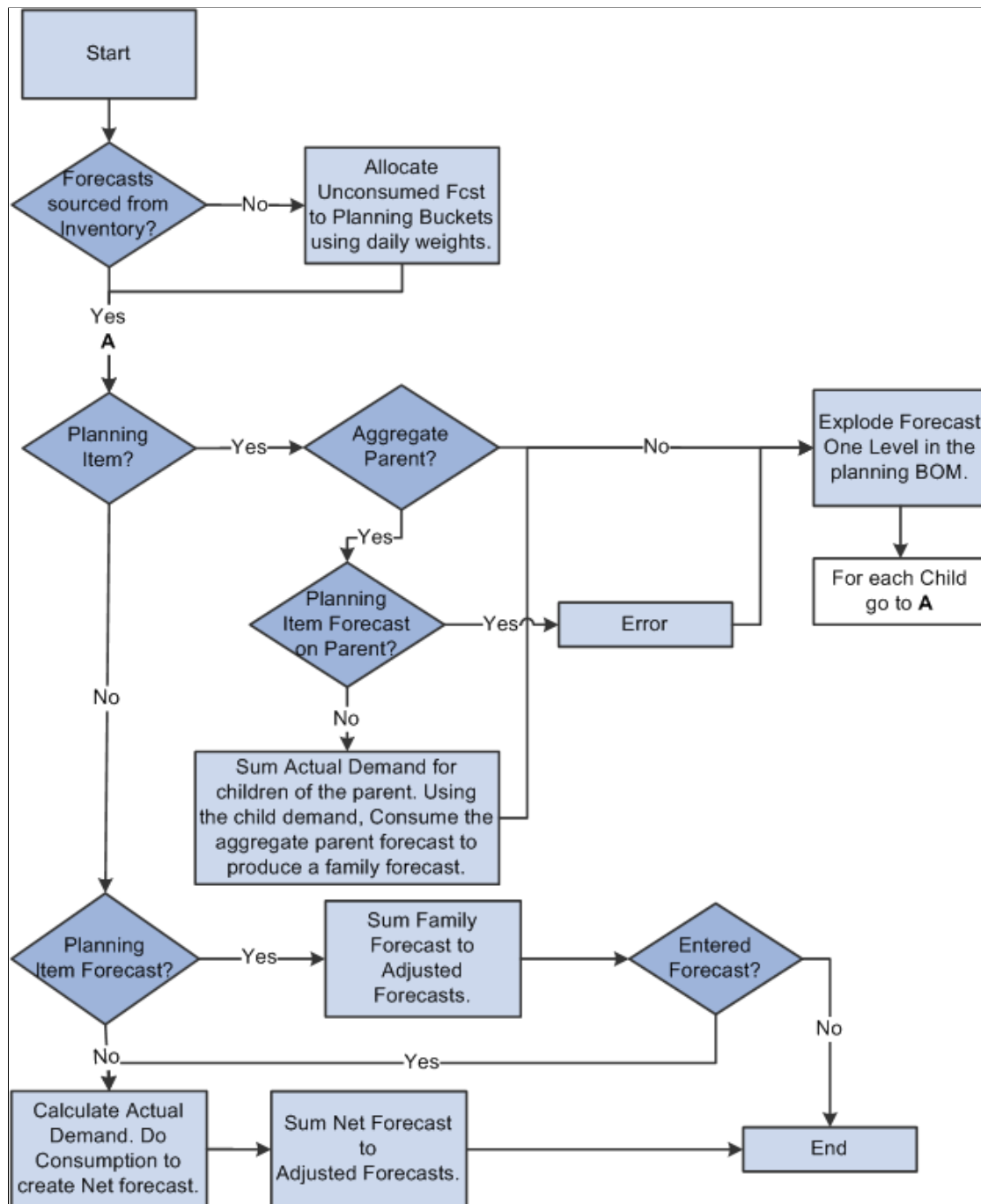
PeopleSoft Supply Planning performs these steps for each item in the Unconsumed Forecast table (PL_FORECAST_UNC).

Forecast Allocation Followed by Forecast Consumption (Process B)

In this scenario, PeopleSoft Supply Planning converts forecasts from PeopleSoft Publish Forecast table buckets into PeopleSoft Supply Planning buckets, and then consumes the forecast:

Image: Forecast allocation followed by forecast consumption

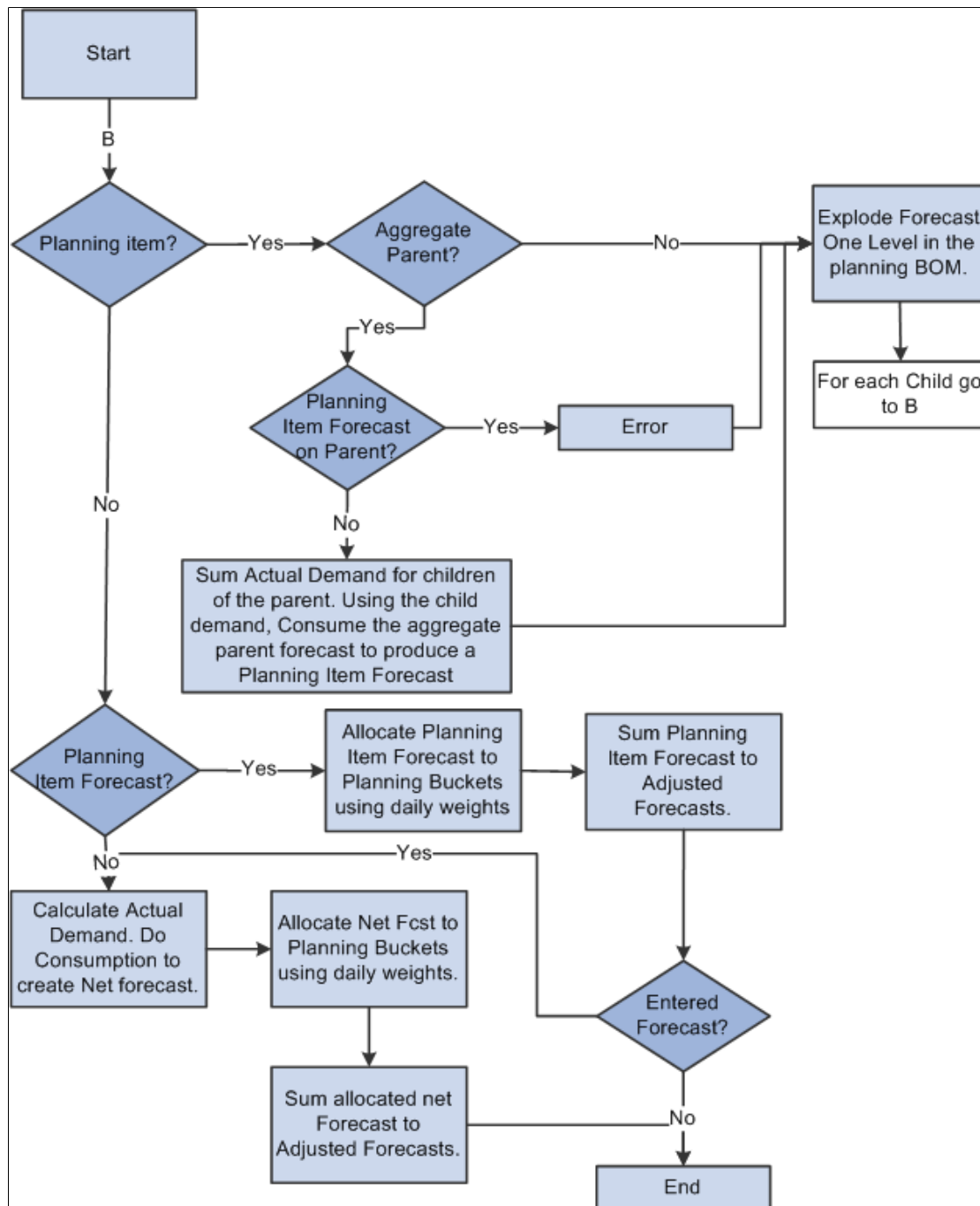
This diagram illustrates how PeopleSoft Supply Planning converts forecasts from PeopleSoft Publish Forecast table buckets into PeopleSoft Supply Planning buckets, and then consumes the forecast:

**Forecast Consumption Followed by Forecast Allocation (Process C)**

In this scenario, PeopleSoft Supply Planning consumes a forecast using period buckets, producing a net forecast for each PeopleSoft Publish Forecast table. PeopleSoft Supply Planning then allocates the net forecast into planning periods.

Image: Forecast consumption followed by forecast allocation

This diagram illustrates how PeopleSoft Supply Planning consumes a forecast using period buckets, producing a net forecast for each PeopleSoft Publish Forecast table. PeopleSoft Supply Planning then allocates the net forecast into planning periods.



Forecast Adjustment

PeopleSoft Supply Planning adjusts forecast planning bucket quantities to match known actual demand. Using a process called forecast adjustment, PeopleSoft Supply Planning moves an unconsumed forecast that exists before the demand fence, prorating the unconsumed forecast to periods after the demand fence.

Forecast adjustment is necessary when the PeopleSoft Publish Forecast table and the bucket size is large (monthly or greater) and the PeopleSoft Supply Planning bucket size is small (for example, weekly).

PeopleSoft Supply Planning adjusts forecast when:

- PeopleSoft Publish Forecast tables provide unconsumed bucketed forecasts for PeopleSoft Supply Planning. This forecast data comes from Demantra Demand Management.
- You enable forecast consumption (select Allow Forecast Consumption on the Load Planning Instance - Orders/Forecast: Forecast page).
- Consumption occurs after the allocation from PeopleSoft Publish Forecast table buckets to PeopleSoft Supply Planning buckets.

PeopleSoft Supply Planning considers only whole PeopleSoft Supply Planning buckets that occur before the demand data and that fit into the PeopleSoft Publish Forecast table bucket for the unconsumed forecast. PeopleSoft Supply Planning distributes an unconsumed forecast evenly across the remaining planning buckets that match the demand management period.

Understanding Forecast Allocation

PeopleSoft Supply Planning enables you to control how you allocate forecasts from PeopleSoft Publish Forecast table periods into PeopleSoft Supply Planning forecast buckets.

PeopleSoft Supply Planning breaks down PeopleSoft Publish Forecast table bucket forecasts into daily forecasts using the PeopleSoft daily weights, then aggregates the daily forecasts into planning buckets.

See "Setting Up Calendar and Weight Profiles" (PeopleSoft FSCM 9.2: Supply Chain Management Integration).

Example: Forecast Allocation

In this example, PeopleSoft Supply Planning allocates these raw PeopleSoft Publish Forecast tables unconsumed forecasts:

<i>January Forecast</i>	<i>February Forecast</i>	<i>March Forecast</i>
1000	900	1100

Assume that these daily weights exist and are applied in PeopleSoft Publish Forecast tables for all three months:

<i>Monday</i>	<i>Tuesday</i>	<i>Wed.</i>	<i>Thursday</i>	<i>Friday</i>	<i>Saturday</i>	<i>Sunday</i>
1	1	1	1	2	0	0

PeopleSoft Supply Planning forecast buckets are weekly and always begin on a Sunday. The plan starts on Monday, January 21. This table lists how PeopleSoft Supply Planning allocates the forecast:

Bucket Start	Quantity	Calculation
January	222	$(1+1+1+1+2)/27 \ 1000$
January	224	$(1+1+1)/27*1000 + (1+2)/24*900$
February	225	$(1+1+1+1+2)/24 \ * \ 900$
February	225	$(1+1+1+1+2)/24*900$
February	225	$(1+1+1+1+2)/24 \ * \ 900$
February	235	$(1+1+1)/24 \ * \ 900 + (1+2)/27*1100$
March	244	$(1+1+1+1+2)/27 \ * \ 1100$
March	244	$(1+1+1+1+2)/27 \ * \ 1100$

Analyzing Planning Problems

Understanding Planning Problems

PeopleSoft Supply Planning enables you to view and analyze data before committing the plan or running another iteration of the plan.

Planning Violations and Exceptions

PeopleSoft Supply Planning separates planning violations and planning exceptions into two main component categories:

- Planning violations: An exception or error that might be visible to the planning solvers.

The solvers might attempt to correct the error. A solver execution should reduce the number of these violations.

- Planning exceptions: An exception or error that is not visible to the planning solver.

Generally, exceptions preexist in the model data or are caused by manual interaction with the model data. A solver execution run may not reduce the number of exceptions, except where the exception is removed when a solver corrects a related error. A solver execution run should not increase the number of exceptions.

Supply and Demand Analysis Reporting

PeopleSoft Supply Planning offers a wide range of query and reporting possibilities. You can use any of our standard reports or alter them to suit specific business needs.

With PeopleSoft Supply Planning, you can:

- Identify items with on-hand quantity but little or no demand.
- Identify the quantity and value of on-hand stock levels above the excess and safety stock level at a period end.
- Calculate when inventory levels will fall to zero (or near zero) based on actual and planned demand, as well as actual supply.
- Report on all of the planned reschedules—including transfers, production, purchase orders (POs), and sales orders within a selected date range and for a specific planning instance.
- Report horizontal planning data by selecting and naming only row types that you want to view.

Row types can include supply, demand, on-hand quantities, and available-to-promise. You can dynamically select the data to be reported.

- Report on detail resource usage—machines, crews, and tools—within a planning instance, based on scheduled and planned production.

Common Elements Used to Understand Planning Problems

Show Supply	Click the button for an order to access the corresponding Show Supply page, where you can view a list of orders, the outputs of which are used to satisfy the demands of the selected order.
Show Demand	Click the button for an order to access the corresponding Show Demand page, where you can view a list of orders that use the items supplied from the selected order.
Business Unit	When appearing on a search criteria page, select a value to include in the results only for items or orders associated with a specific business unit. Leave this field blank to include all of the business units associated with the planning instance report layout.
Category	When appearing on a search criteria page, select a value to include only those items or orders associated with a specific item category.
Configuration Code	A non-active field that is related to a deprecated product.
Customer	When appearing on a search criteria page, select a value to include only those customer orders for the specified customer.
Date Range	<p>Select Use Planning Instance Dates to use the start and end dates defined for the corresponding planning instance. Click the Planning Instance Information button for the start and end dates defined for the planning instance.</p> <p>You can also define a specific from and to date, or define a number of offset days from the report run date. Use the Offset feature to run the report on an ongoing basis without modifying the run control.</p>
Demand Value Transacted	Select to sort by demand transaction value. Items with the smallest demand transaction valuation appear first in the report list.
Family	When appearing on a search criteria page, select a value to include only those items or orders associated with a specific item family.
Family Forecast	The system populates this field if the forecast was allocated to the item as a result of a planning bill of material (BOM) or aggregate demand relationship (and not directly entered for the item).

When you add a forecast for a planning item, the system associates a forecast type of *Forecast* with the planning item, and adds forecast types *Planning Forecast* to the exploded children of the planning item. You can change the quantity of a planning forecast or delete it at any time. If you modify the quantity of a planning forecast, you must rerun forecast consumption to view the results reflected in the net forecast values.

From Date and To Date

The system selects only the criteria in the specified date range. When searching for violations and exceptions, consider:

- For effectivity date violations and calendar violations, the system counts the exception if the exception date falls in the date range.
- For inventory policy violations, the system counts the exception only if the occurrence of the error falls within the date range for the corresponding item.
- For order sizing violations, the system counts the exception if the receipt date is in the date range.

Item Group

When appearing on a search criteria page, select a value to include only those items or orders associated with a specific item group.

Item ID

When appearing on a search criteria page, select a value to include in the search results only for the item specified. The value here represents the unique identifier that the system uses to track and retrieve the item. If you do not enter a value here, the system includes all of the items in the business unit that meet the specified search criteria.

Number of Transactions

Select to sort by the number of demand transactions. Items with the fewest demand transactions appear first in the report list.

Number of Units Transacted

Select to sort by the number of units transacted. Items with the fewest units transacted appear first in the report list.

Order Type

When appearing on a search criteria page, select the reschedule information that you want to include in the search results.

On the Planning Reschedule Report page, select the reschedule information that you want to include on the Planning Reschedule report.

Period Selection

Define the period end dates. Values are: *Weekly* and *Monthly*.

Planner Code

When appearing on a search criteria page, select a value to include only those items or orders associated with a specific planner.

Planned By	When appearing on a search criteria page, select a value to include only those items or orders associated with the specified planned-by types.
Primary Buyer	<p>An item attribute that you establish when you create a planning instance from this hierarchy:</p> <ol style="list-style-type: none"> 1. Item Business Unit (PURCH_ITEM_BU.PRIMARY_BUYER). 2. Item Purchase Attributes (PURCH_ITEM_ATTR.PRIMARY_BUYER). 3. Item Category (ITM_CAT_TBL.PRIMARY_BUYER). 4. Purchasing Loader Defaults (PO_LOADER_DFL.BUYER).
Planning Instance	Appears by default from the Installation Options - Planning page or User Preferences page. Planning instance IDs define a complete set of data that controls the items and business units for problem resolutions. Define planning instances on the Planning Instance Definition page. This field is required.
Tolerance	Select Exclude Within Tolerance to exclude all of the reschedule messages within the tolerance defined from the Planning Reschedule report.
Utilization Type	When appearing on a search criteria page, select a value to include only those items or orders associated with a specific item utilization type.
Supplier ID and Location	When appearing on a search criteria page, select values to include only the purchase transactions for the selected supplier and supplier location.

Extracting and Reviewing Planning Violations

This topic provides an overview of planning violations.

Pages Used to Extract and Review Planning Violations

Page Name	Definition Name	Usage
Extract Demand Violations Page	SPL_DMD_VIOLATIONS	Extract demand violations for orders pegged to low level orders with violations.
Violations Page	PL_REVIEW_ERRORS	Establish plan violation criteria and filters and retrieve violations that prevent a material or capacity plan from being feasible.

Page Name	Definition Name	Usage
Violations - Filter Violations Page	PL_RVW_ERR_FILTERS	Specify selection criteria to narrow the number of violations that the system displays on the Violations summary page.
Violations - Item Violations Page	PL_RVW_ERR_ITEM	Review violations for negative quantity on hand or safety stock.
Violations - Delayed Demand Violations Page	PL_RVW_ERR_DELAYED	Review delayed demand violations for customer orders, transfers, and extra demand.
Violations - Resource Violations Page	PL_RVW_ERR_WC	Review work center overload capacity violations.
Violations - Unfulfilled Demand Violations Page	PL_RVW_ERR_SUPPLY	Review violations related to unavailable supply for existing and planned demands.
Demand Violations Search Page	SPL_DMD_V_INQ_SRCH	Specify search filters and retrieve violations generated by the Extract Demand Violations process.
Demand Violations Detail Page	SPL_DMD_V_INQ_DTL	Review violations for end demands and for planned transfers and production pegged to a lower level supply order with a violation.

Understanding Planning Violations

The Violations component displays violations within the planning instance that are visible to the planning solvers. Violations are available as realtime data, which requires that the planning instance be loaded into a planning engine at the time that violations appear (except at the end of a solver run, when you can generate a summary report for any remaining violations).

When accessing the Violations component, the system initially displays all of the violations. These are separated by planning object type on a summary page. Before filtering, the Filtered column totals on the Violations page match the column totals for each type of error. After you apply filtering criteria, the filtered count may be less than the total count. If you specify multiple filter criteria, the system includes only the violations that meet all of the filter criteria.

From the Review Planning Violations Summary page, you can navigate to access more detailed error information.

Delayed Demand

Delayed demand violations occur for end demands (forecasts, sales orders and material stock requests) that cannot be met on time. If you use the Material Solver, it schedules all end demands at their scheduled dates and therefore, never creates violations in the delayed demand violation section. Instead, all planning problems generated by the Material Solver are reported in the unfulfilled demand violations section.

If you use the Feasible Solver and want to view delayed demand violations, then you must select the Allow Rescheduling box on the Feasible Solver page. If you do not check the Allow Rescheduling box, the system will report all demand violations in the unfulfilled demand violations section.

Unfulfilled Demand

Unfulfilled demand violations occur for lower level demands (not end demands) on items that cannot be met on time. The system determines the unfulfilled demand error classification (production, purchase, or transfer) based on the default sourcing option that you select for an item. If you do not define a default option for an item, the system bases the unfulfilled demand error classification on the item's make or buy option.

The system orders demands for an item according to:

1. Demand date (earliest to latest).
2. Priority (highest to lowest).
3. Quantity (smallest to largest).
4. Sequence number (smallest to largest).

The system can filter to show all Unfulfilled Violations or consider Reschedule Tolerance and show demands not met by supplies within tolerance.

Extracting Higher Level Demand Violations

When you run a solver, the system automatically reports delayed and unfulfilled demand violations. However, if you use the Material solver or the planning instance contains frozen demands, you may need to extract higher level demand violations.

If you run the Material solver, it reports demand violations at the lowest level demand in the supply chain that has the violation and does not identify the higher level demands that are affected. For example, suppose you are building an assembly on a production order to fulfill a requirement from a sales order; and a purchase order for a component used to build the assembly is late. In this case, the system will report an unfulfilled demand violation for the component. It does not report a violation for the production order or the sales order.

To view violations for higher level demands, you must run the Extract Demand Violations process. After you run this process, you can view the demand violations in the Demand Violations component. The system stores these violations and their associated orders in a table named SPL_VIOLATIONS. When you transfer the planning instance to PeopleSoft Supply Chain Management, the system also transfers the SPL_VIOLATIONS table so that you can exclude these orders from the commit process.

Extract Demand Violations Page

Use the Extract Demand Violations page (SPL_DMD_VIOLATIONS) to extract demand violations for orders pegged to low level orders with violations.

Navigation

Supply Planning > Solve Plan > Extract Demand Violations

Note: You only need to run the Extract Demand Violations process if you want to view higher level demand violations in the Demand Violations component or if you want to identify higher level orders with demand violations when you commit planning updates. The system displays the information generated by this process in the Demand Violations component, not in the Violations component.

Planning Instance	Select the planning instance for which you want to extract demand violations.
Start Planning Engine and URL	Select to start the planning engine for the corresponding planning instance. If the planning engine is already running, the system ignores this option and uses the domain on which the planning engine is currently running. If you select Start Planning Engine and the planning engine is not currently running, the system starts the planning engine for the corresponding planning instance using the domain that you specify in the URL field. If you specify no domain, or if the planning engine fails to start on the domain that you specify in the URL field, the system uses the default URL that you define on the Planning Engine Domains page.
Run	Click to extract demand violations using the PeopleSoft Process Scheduler.

Violations Page

Use the Violations page (PL_REVIEW_ERRORS) to establish plan violation criteria and filters and retrieve violations that prevent a material or capacity plan from being feasible.

Navigation

Supply Planning > Solve Plan > Analysis > Violations

Image: Violations Page

This example illustrates the fields and controls on the Violations Page. You can find definitions for the fields and controls later on this page.

Violations

*Planning Instance

Saved Counts Date/Time

Current Date/Time

07/09/2012 2:05:15AM

Start Date

End Date

Early Fence Date

Late Fence Date

Current Date

Capacity Fence Date

Item Violations

Category	Filtered	Total
Negative Planned Quantity	0	0
Safety Stock	0	0

Resource Violations

Category	Filtered	Total
Work Center Capacity	0	0
Operations Without Capacity	0	0

Delayed Demand Violations

Category	Filtered	Total
Customer Ship Dates	0	0
Transfer Ship Dates	0	0
Extra Demand Ship Dates	0	0
Stock Request Ship Dates	0	0
Forecast Fulfillment	0	0

Unfulfilled Demand Violations

Category	Filtered	Total
Purchase Material Shortage	0	0
Transfer Supply Shortage	0	0
Production Supply Shortage	0	0

Saved Counts Date/Time

Select a previously saved set of violation counts for review. You can save summary violation counts at any time, including before or after solver runs. When you save violation counts, the system retains the totals only. Additional details for saved counts are not available.

Search

Click to perform a new search using the filters that you defined.

Filter Violations

Click to access the Violations - Filter Violations page, where you can specify selection criteria to narrow the number of violations that the system displays on the Violations summary page.

Start Date

The beginning time boundary. Used with the end of time, this region defines the time period within which the system recognizes orders and changes. Solvers do not recognize times before the start of time.

End Date

The concluding time boundary. Solvers do not recognize orders or changes after this date.

Current Date

The current date and time for the planning instance. This fence is used to define various time offsets respected by the planning solvers.

Early Fence Date

The beginning time of the interval within which solvers process the elements of the material- and capacity-feasible plans and calculate constraint violations.

Item Violations**Negative Planned Quantity**

An item has a negative planned quantity on hand between the item's early fence and the late fence. The system calculates the violation if the item's histogram quantity falls below zero at any time between the current time and the late fence.

Note: The system counts an item with negative planned quantity only once, even if the item has multiple occurrences of negative planned quantity on hand.

Safety Stock

The system generates a violation if an item has a planned quantity on hand below safety stock between the item's early fence and the late fence.

Note: The system counts an item with stock violations only once, even if the item has multiple occurrences of safety stock violations.

Delayed Demand Violations**Customer Ship Dates**

The target ship date on a customer order cannot be met, and the order will ship late. The system generates a violation if the planned ship date is after the target ship date.

Transfer Ship Dates

The scheduled ship date on a transfer cannot be met and the transfer will be supplied late. The system generates a violation if the planned ship date is after the scheduled ship date.

Extra Demand Ship Dates

The target demand date on an extra demand required cannot be met and the extra demand will be supplied late. The system generates a violation if the planned schedule date is after the schedule ship date.

Stock Request Ship Dates

The target ship date on a material stock request cannot be met and the material stock request will be shipped late. The system generates a violation if the planned ship date is after the schedule ship date.

Forecast Fulfillment

A forecast demand cannot be met on the forecast date. The system generates a violation if the forecast demand has been canceled or satisfied at a later time.

Resource Violations

Work Center Capacity

A work center is overloaded. The system generates a violation if the work center's aggregate utilization exceeds the resource aggregate capacity between the global early fence and the capacity fence.

Note: The system counts a work center capacity violation only once, even if the work center has multiple periods where it is overloaded.

Operations Without Capacity

A production operation occurs at a work center for which the work center capacity has been exceeded. The system generates a violation only for production operations for which no or partial work center availability exists. For example, if an operation occurs in an overloaded capacity bucket and the operation only consumes available capacity, the system does not generate a violation.

The system sorts which operation steps use the available capacity according to:

- Operation start date and time.
- Priority.
- Work center quantity usage (smallest to largest).
- Sequence number.

By sorting based on operation start date and time, the system first allocates available capacity to operations that may have started in a previous capacity bucket.

Unfulfilled Demand Violations

Production Supply Shortage

Demand has no supply for items where the default sourcing option is a production option. The system generates a violation if the supply for any demand on an item (for which the default sourcing option is a production sourcing option) does not exist or would occur after the demand date. If an item has no default sourcing option, the system considers the sourcing type a production sourcing option if the item's make or buy option is *Make*.

Purchase Material Shortage

Demand has no supply for items where the default sourcing option is a purchase option. The system generates a violation if the supply for any demand on an item (for which the default sourcing option is a purchase sourcing option) does not exist or would occur after the demand date. If an item has no default sourcing option, the system considers the sourcing type a purchase sourcing option if the item's make or buy option is *Buy*.

Transfer Supply Shortage

Demand has no supply for items where the default sourcing option is a transfer option. The system generates a violation if the supply for any demand on an item (for which the default sourcing option is a transfer sourcing option) does not exist or would occur after the demand date.

Violations - Filter Violations Page

Use the Violations - Filter Violations page (PL_RVW_ERR_FILTERS) to specify selection criteria to narrow the number of violations that the system displays on the Violations summary page.

Navigation

Click the Filter Violations link on the Violations page.

Image: Filter Violations Page

This example illustrates the fields and controls on the Filter Violations Page. You can find definitions for the fields and controls later on this page.

Violations

Filter Violations

Planning Instance USBIKE

General Filters

Business Unit

Planner Code

From Date:

Current Date

Early Fence Date

Specific Date

Priority Rank <=

To Date

Negative Quantity Duration Days

Safety Stock Neg Qty Duration Days

Item Filters

Plan By

Distribution Plan

Master Plan

Material Plan

Utilization Type

From Item ID

To Item ID

From Item Configuration Code

To Item Configuration Code

Resource Filters

Work Center Group

Work Center

☐ Ignore Non-Critical Work Centers

Unfulfilled Demand Violations

All

With Reschedule Tolerance

Search

Clear

Return to Violations

Business Unit

Select violations for the specified inventory business unit only.
For interunit transfers, the system uses the source business unit.

Planner Code

Select violations for items associated with a specific planner code only.

From Date and To Date

Select violations in the date range specified only. For item violations and capacity violations, the system selects only those violations where the occurrence falls within the date range for the item. For delayed demands, the system selects violations only if the target ship date is in the date range. For unfulfilled demands, the system selects violations only if the demand date is in the date range. Define the from date as an early fence date, current date, or as a specific date. If you specify no date range, the system uses the late fence date as the to date when calculating for violations.

Priority Rank

Applies to unfulfilled demand violations and delayed demand violations only. Select violations if the item's demand priority rank is equal to or higher than the specified priority.

Note: Small priority rank numbers (those numbers closer to zero) have higher demand priorities.

Negative Quantity Duration

Select only the negative quantity violations in which the duration is greater than or equal to the number of days specified in this field.

Safety Stock Neg Qty Duration
(safety stock negative quantity duration)

Select only the safety stock violations in which the duration is greater than or equal to the number of days specified in this field.

Planned By

Select only those violations that are associated to items with these specified planned-by types: distribution plan, master plan, and material plan.

Utilization Type

Select only those violations with items that are associated with the utilization type.

From Item ID and To Item ID

Select only those violations with item codes in the specified range.

From Item Configuration Code and To Item Configuration Code

A non-active field that is related to a deprecated product.

Work Center

Select capacity violations that occur on the specified work center. The work center filter applies to operations without capacity and aggregate capacity violations only.

Work Center Group

Select capacity violations that occur on work centers in the specified work center group. The work center group filter applies to operations without capacity and aggregate capacity violations only.

Ignore Non-Critical Work Centers

Select the check box to ignore capacity violations for Non-Critical Centers.

Unfulfilled Demand Violations

All	Shows all Unfulfilled Violations. This is the default selection.
With Reschedule Tolerance	Select to display Unfulfilled Violations, without considering demands which are satisfied by supplies within tolerance.

Note: The system determines the aggregate capacity error total according to the total count in the Operations without Capacity Filtered column on the Violations page. For example, suppose that after applying the item filter, the operations without capacity all occur on the same work center (and the total in the corresponding Filter column equals *I*), then the work center capacity total error count equals *I*.

Return to Violations	Click to return to the Violations page without performing a search.
Search	Click to apply the filtering criteria and review the results on the Violations page.
Clear	Click to delete all of the previously entered filter criteria.

Violations - Item Violations Page

Use the Violations - Item Violations page (PL_RVW_ERR_ITEM) to review violations for negative quantity on hand or safety stock.

Navigation

Click any amount total in the Filtered or Total column in the Item Violations group box on the Violations page.

Item ID	Click any value in this column to access the Material Workbench - Summary page, where you can analyze the material plan for the item and resolve item violations manually. See Using the Material Plan Workbench .
First Violation Date	Displays the date that the first shortage or safety stock violation occurs.
First Duration (Days)	Displays the number of days the first error is in violation.
First Shortage Quantity	Displays the shortage quantity (the maximum deviation from the safety stock level) when the first violation occurs.
Maximum Shortage Quantity	Displays the maximum deviation from the safety stock level for the item.

Violations - Delayed Demand Violations Page

Use the Violations - Delayed Demand Violations page (PL_RVW_ERR_DELAYED) to review delayed demand violations for customer orders, transfers, and extra demand.

Navigation

Click any amount total in the Filtered or Total column in the Delayed Demand Violations group box on the Violations page.

Common Information

Order

Displays the order number. For example, depending on the order type, this field might display a sales order number, quote number, or buying agreement number.

Click any value in this column to access the corresponding Refine Plan Details page for the order type. For example, suppose that the order type is *Material Stock Request*, you can click the order ID value to access the Refine Plan - Stock Requests page, where you can maintain information about internal and external demand orders on an inventory business unit, such as planning parameters, dates, and quantities.

Order Tab

Select the Order tab.

Order Type

Displays the type of demand for the corresponding item.

Planning Start Date/Time

Displays the current date PeopleSoft Supply Planning intends to ship the order.

Original Start Date/Time

Displays the date and time the transaction system intended to ship the order.

Details Tab

Select the Details tab.

Demand Quantity

Displays the demand quantity for the corresponding order line.

Priority Rank

Displays a numeric value ranging from 1 (highest priority) to 999 (lowest priority) used by the planning engine to determine the order in fulfilling the demand. The system reserves 0 as a priority value.

Customer Tab

Select the Customer tab.

Ship To Customer

Displays the customer ID that identifies where the order is to be shipped. The customer name appears in the adjacent field.

Violations - Resource Violations Page

Use the Violations - Resource Violations page (PL_RVW_ERR_WC) to review work center overload capacity violations.

Navigation

Click any amount total in the Filtered or Total column in the Resource Violations group box on the Violations page.

Work Center	Click any work center ID in this column to access the Capacity Workbench, where you can analyze the capacity plan and resolve capacity violations manually. See Using the Capacity Workbench .
First Period Start Date/Time	Displays the starting date of the period with the first capacity overload occurrence.
First Overloaded Quantity	Displays the overload amount for the first capacity overload occurrence.
Buckets Overloaded	Displays the number of buckets with capacity overloads.
Maximum Overloaded Quantity	Displays the maximum overload amount for the capacity planning period.

Violations - Unfulfilled Demand Violations Page

Use the Violations - Unfulfilled Demand Violations page (PL_RVW_ERR_SUPPLY) to review violations related to unavailable supply for existing and planned demands.

Navigation

click any amount total in the Filtered or Total column in the Unfulfilled Demand Violations group box on the Violations page.

Common Information

Order Type	Displays the type of demand for the corresponding item.
Order	Displays the order number. For example, depending on the order type, this field might display a sales order number, quote number, or buying agreement number. Click any value in this column to access the corresponding Refine Plan Details page for the order type. For example, suppose that the order type is <i>Material Stock Request</i> , you can click the order ID value to access the Refine Plan - Stock Requests page, where you can maintain information about internal and external demand orders on an inventory business unit, such as planning parameters, dates, and quantities.

Order Tab

Select the Order tab.

Operation Sequence

Displays where you need components in the manufacturing process. PeopleSoft Production Management uses the work center associated with each operation and the WIP location associated with each work center to determine where to deliver components. The component's issue method in combination with the operation sequence determines when and where the material is delivered. It determines how the system updates inventory in the WIP location, as well as the quantity issue on the component list. When the operation sequence is set to zero or an invalid operation sequence is specified, it is assumed that the component item is to be used for the first operation.

Details Tab

Select the Details tab.

Demand Quantity

Displays the demand quantity for the corresponding order.

Priority Rank

Displays a numeric value ranging from 1 (highest priority) to 999 (lowest priority) used by the planning engine to determine the order in fulfilling the demand. The system reserves 0 as a priority value.

Ship To Customer

Displays the customer ID to which the order is shipped. The customer name appears in the adjacent field.

Demand Violations Search Page

Use the Demand Violations Search page (SPL_DMD_V_INQ_SRCH) to specify search filters and retrieve violations generated by the Extract Demand Violations process.

Navigation

Supply Planning, Solve Plan, Analysis, Demand Violations

Planning Instance

Select violations for the specified planning instance.

Business Unit

Select violations for the specified inventory business unit only. For interunit transfers, the system uses the source business unit.

Item ID

Select violations for the specified item ID only.

Planner Code

Select violations for items associated with a specific planner code only.

Configuration Code

A non-active field that is related to a deprecated product.

Planned By	Select only those violations that are associated to items with these specified planned-by types: distribution plan, master plan, and material plan.
Start Date and End Date	Select violations in the date range specified only. The system selects violations only if the planning date is in the date range. If you specify no end date, the system uses the late fence date as the end date when searching for violations.
Family	Select violations for the specified item family only.
Utilization Type	Select only those violations with items that are associated with the utilization type.
Category	Select violations for the specified item category only.
Search	Click to apply the filtering criteria and review the results on the Demand Violations Detail page.
Clear	Click to delete all of the previously entered filter criteria.
Order Type Filters	Indicate whether you want to include violations that pertain to these orders types: sales orders/quotes, purchases, production, transfers, buying agreements, planned purchases, planned production, planned transfers, forecasts, stock requests and extra demand.

Demand Violations Detail Page

Use the Demand Violations Detail page (SPL_DMD_V_INQ_DTL) to review violations for end demands and for planned transfers and production pegged to a lower level supply order with a violation.

Navigation

Click Search from the Demand Violations Search page.

Note: You must run the Extract Demand Violations process before you can view information in the Demand Violations Detail page. If you make manual changes to the plan or run a solver after you initially run the Extract Demand Violation process, you should rerun the Extract Demand Violation process.

Note: The demand violations displayed by the system are potential problems in the plan. The Extract Demand Violations process uses a first in, first out sorting order for supplies and demands. Therefore, if you allocate supply using a priority scheme, the displayed demands with violations may not be the actual demands affected by the lower level supply problem.

Common Information

Planning Due Date/Time	Displays the planning due date/time of the order.
Business Unit	Displays the business unit for the order. For interunit transfers, the system uses the source business unit.

Order Type

Displays the type of demand for the corresponding item.

Order

Displays the order number. For example, depending on the order type, this field might display a sales order number, quote number, or buying agreement number.

Click any value in this column to access the corresponding Refine Plan Details page for the order type. For example, suppose that the order type is *Stock Request*, you can click the order ID value to access the Refine Plan - Stock Requests page, where you can maintain information about internal and external demand orders on an inventory business unit, such as planning parameters, dates, and quantities.

Line

Displays the line, schedule and kit number for a sales order or buying agreement. For a stock request or a transfer, the system displays "IN" followed by the line, schedule and demand line number.

Order Tab

Select the Order tab.

Show Supply

Click to access the corresponding Show Supply page, where you can view a list of orders, the outputs of which are used to satisfy the demands of the selected order.

Show Demand

Click to access the corresponding Show Demand page, where you can view a list of orders that use the items supplied from the selected order.

Violations Count

Displays the number of violations for lower level supply orders that are pegged to the order.

Item Tab

Select the Item tab.

Item ID

Displays the item ID associated with the violation.

Description

Displays the description for the item ID.

Configuration Tab

Select the Configuration tab.

Configuration Code

A non-active field that is related to a deprecated product.

Extracting Pegging Information Page

This process will extract information on supply that has been pegged to top level demand, and place it in the output table PS_SPL_PEGGING_INF. You will need to create a report to view the pegging information. You can filter the extracted output by adjusting the values within the Selection Criteria, Date Range, and Order Type group boxes.

Page Used to Extract Pegging Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Extract Pegging Information Page</u>	PL_PEGGING_REQ1	Extract information on supply that has been pegged to top level demand.

Extract Pegging Information Page

Use the Extract Pegging Information page (PL_PEGGING_REQ1) to extract information on supply that has been pegged to top level demand.

Navigation

Supply Planning, Solve Plan, Extract Pegging Information

Image: Extract Pegging Information Page

This example illustrates the fields and controls on the Extract Pegging Information Page. You can find definitions for the fields and controls later on this page.

Start Planning Engine

Select this box and the process will start the planning engine prior to running the extract.

Include Configured Items

A non-active field that is related to a deprecated product.

Offset

Values entered in the Offset field will allow the date range to be based on a set amount of days earlier or later than the current date.

Viewing results of the Extract Pegging Information process

Extract Pegging transaction calls several Show Demand methods. Pegging class are modified to be in sync with the Show Demand change. Similar to Show Demand, the pegging result also displays safety stock demand if any. The setting for safety stock option (Ignore, Ignore Until First Demand, or Fulfill) is obtained from Planning Instance's safety stock option. The behavior is same as Show Demand.

To ensure planning instance's safety stock option to pass on to pegging transaction, a new input parameter "IGNORE_SAFETY" is added to the PL_EXTRACT_PEGGING transaction.

This section explains the output from the Extract Pegging Information process. The values are stored in the PS_SPL_PEGGING_INF table. Listed below are some of the fields within the PS_SPL_PEGGING_INF table. Obvious and common fields are not noted.

- PL_MRP_ORDER_TYPE (Planning MRP Order Type): The value in this field will be dependant on the source. These sources are:
 - 020: Production Order
 - 050: Planned Production Order
 - 010: Purchase Order
 - 040: Planned Purchase Order
 - 030: Transfer Order
 - 060: Planned Transfer Order
- PL_DMD_ORDER_TYPE (Planning Demand Order Type): The value in this field identifies the top level demand type for the given supply. These demand types are:
 - 020: Production Order Component
 - 050: Planned Production Order Component
 - 030: Transfer Demand
 - 060: Planned Transfer Demand
 - 120: Net Forecast
 - 090: Sales Order
 - 100: Buy Agreements
 - 070: Stock Request
 - 110: Extra Demand
 - 300: Negative Quantity on Hand
 - 600: No Demand
- PL_ORDER_KEY (Planning Order Key): The value in this field is the order identifier of the top level demand for the given supply. These order identifiers are:
 - PRODUCTION_ID: Production Order Component
 - PL_SEQ_NBR: Planned Production Order Component
 - ORDER_NO: Transfer Demand
 - PL_SEQ_NBR: Planned Transfer Demand
 - PL_FORECAST_ID: Net Forecast

- *BUSINESS_UNIT/ORDER_NO*: Sales Order
 - *CNTRCT_ID*: Buy Agreements
 - *ORDER_NO*: Stock Request
 - *PL_SEQ_NBR*: Extra Demand
-
- *PL_LINE_KEY* (Planning Line Key): The value in this field is the line number of the top level demand for the given supply. These line numbers are:
 - *OP_SEQUENCE*: Production Order Component
 - *OP_SEQUENCE*: Planned Production Order Component
 - *DEMAND_SOURCE/ORDER_INT_LINE_NO/SCHED_LINE_NO/DEMAND_LINE_NO*: Transfer Demand
 - *DEMAND_SOURCE/ORDER_INT_LINE_NO/SCHED_LINE_NO/DEMAND_LINE_NO*: Planned Transfer Demand
 - *DEMAND_SOURCE/ORDER_INT_LINE_NO/SCHED_LINE_NO/DEMAND_LINE_NO*: Net Forecast
 - *ORDER_INT_LINE_NO/SCHED_LINE_NBR/KIT_LINE_NBR*: Sales Order
 - *ORDER_INT_LINE_NO/SCHED_LINE_NBR/KIT_LINE_NBR*: Buy Agreements
 - *DEMAND_SOURCE/ORDER_INT_LINE_NO/SCHED_LINE_NO/DEMAND_LINE_NO*: Stock Request
 - *DEMAND_SOURCE/ORDER_INT_LINE_NO/SCHED_LINE_NO/DEMAND_LINE_NO*: Extra Demand
 - *PL_INV_ITEM_ID* (Planning Inventory Item ID): The value in this field is the inventory item of the top level demand for the given supply. For Production Order Component and Planned Production Order Component, it is the value of *COMPONENT_ID*.
 - *SETID*: This field is for Buy Agreement only.

Reviewing Planning Exceptions

Planning exceptions are situations that are in contrast to various parameters defined within the plan, generally caused by changing business rules or manual intervention in the transaction system, or by manual interaction with the planning instance. These exceptions, however, are not directly acted upon by the solvers.

This topic discusses how to define and review Planning Exceptions.

Pages Used to Review Plan Exceptions

Page Name	Definition Name	Usage
<u>Exceptions Page</u>	PL_RVW_EXCP_SUM	Review exceptions by planning object type. You can navigate to detailed exception information.
<u>Exceptions - Filter Exceptions Page</u>	PL_RVW_EXCP_SEL1	Define the filter criteria that you want the system to consider when calculating exceptions.
<u>Exceptions - Calendar Exceptions Page</u>	PL_RVW_EXCP_CAL	Review additional information about the calendar constraints.
<u>Exceptions - Order Sizing Exceptions Page</u>	PL_RVW_EXCP_ORDSZ	Review additional information about the order sizing exceptions.
<u>Exceptions - Effectivity Date Exceptions Page</u>	PL_RVW_EXCP_EFFTV	Review additional information about the effectivity date exceptions.
<u>Exceptions - General and Policy Exceptions Page</u>	PL_RVW_EXCP_INVBOM	Review general and policy violation details. If the Excess Limit Exceeded option is selected then the object name will display as PL_RVW_EXCP_EXCSST.

Exceptions Page

Use the Exceptions page (PL_RVW_EXCP_SUM) to review exceptions by planning object type.

You can navigate to detailed exception information.

Navigation

Supply Planning > Solve Plan > Analysis > Exceptions

Image: Exceptions page (1 of 2)

This example illustrates the fields and controls on the Exceptions page (1 of 2). You can find definitions for the fields and controls later on this page.

Search Problem Instance

Planning Instance

USBIKE

Current Date/Time

01/02/2014 11:16:18PM

Saved Counts Date/Time

Exception Display Options:

☐ Filtered Counts Only
 ☒ Total Counts Only
 ☐ Filtered and Total Counts

Search

Filter Exceptions

Start Date

End Date

Current Date

Early Fence Date

Calendar Exceptions

Category	Filtered	Total
Invalid Ship Dates	0	0
Invalid Receiving Dates	0	0
Planned Supply Before Early Fence	0	0
Receipt Before Current Time	0	0
Missed Customer Request Dates	0	0

Effectivity Date Exceptions

Category	Filtered	Total
Production Option is not Effective	0	0
Component is not Effective	0	0
Substitute Component is not Effective	0	0
Supply Occurs After Phase Out Date	0	0

Image: Exceptions page (2 of 2)

This example illustrates the fields and controls on the Exceptions page (2 of 2). You can find definitions for the fields and controls later on this page.

Order Sizing Exceptions

Category	Filtered	Total
Order Quantity Below Minimum	0	0
Order Quantity Above Maximum	0	0
Order Quantity is not an Increment	0	0

General and Policy Exceptions

Category	Filtered	Total
Invalid BOM Structure	0	0
Supplier Capacity Exceeded	0	0
Excess Limit Exceeded	0	0
Substitutions	0	0

Clear

Save Counts

Saved Counts Date/Time

Select a previously saved set of exception counts for review.

You can save summary exception counts at any time, including before or after solver runs. When you save exception counts, the system retains the totals only. Additional details for saved counts are not available.

Exception Display Options

Indicate how you want the system to calculate and display summary counts. Values are:

- *Filtered Counts Only.*
- *Total Counts Only.*
- *Filtered and Total Counts.*

If you select *Total Counts Only*, you can specify the exception type, general, and order type filters criteria, but the system ignores these filters when calculating the total counts.

Start Date

The beginning time boundary, before which time does not exist within the planning instance. Used with the end of time, this region defines the time period within which the system recognizes orders and changes. Solvers do not recognize times before the start of time.

End Date

The concluding time boundary for the planning instance. Solvers do not recognize orders or changes after this date.

Current Date

The current date and time as established for the planning instance. This fence is used to define various time offsets respected by the planning solvers.

Early Fence Date

The default early fence for the planning instance.

Save Counts

Click to save the summary exception counts to the database for retrieval and review at a later date. Use the Save Counts Date/Time field to select a saved exception count for review.

Calendar Exceptions

Displays supply and demand that occurs at invalid calendar times. Click any link in the Filtered or Total column to access the Calendar Exceptions page, where you can view additional information about the corresponding constraint.

Order Sizing Exceptions

Click any link in the Filtered or Total column to access the Order Sizing Exceptions page, where you can review additional information about the existing orders that do not follow the order minimums, maximums, or increments associated with an item's sourcing definitions.

Effectivity Date Exceptions

Click any link in the Filtered or Total column to access the Effectivity Date Exceptions page, where you can review additional information about orders where exceptions to effectivity dates have been encountered.

General and Policy Exceptions

Click any link in the Filtered or Total column to access the Policy Exceptions page, where you can review additional information about BOM exceptions found while calculating low level codes, planned quantity on hand levels greater than the excess limit, and orders where substitutions have been made.

Exceptions - Filter Exceptions Page

Use the Exceptions - Filter Exceptions page (PL_RVW_EXCP_SEL1) to define the filter criteria that you want the system to consider when calculating exceptions.

Navigation

Click the [Filter Exceptions](#) link on the Exceptions page.

Exception Type Filters

Select the exception types for which you want to search.

Exception Display Options

Indicate how you want the system to calculate and display summary counts. Values are:

- *Filtered Counts Only.*
- *Total Counts Only.*
- *Filtered and Total Counts.*

If you select *Total Counts Only*, you can specify the exception type, general, and order type filters criteria; however, the system ignores these filters when calculating the total counts.

Calendar Exceptions

Invalid Ship Dates

The system counts a demand order (customer order, transfer, or material stock request) if the ship date is not valid for the business unit's shipping calendar.

Invalid Receiving Dates

The system counts a supply order (a PO or a transfer) if the order's receipt date is not a valid receiving date on the business unit's receiving calendar.

Planned Supply Before Early Fence

The system counts a planned supply order if the order begins (start date for production, ship date for transfers, and release date for POs) before the items early fence.

Receipt Before Current Time

The system counts a supply order (production, purchase, or transfer) if the order's receipt date is before the current date time of the planning instance.

Missed Customer Request Dates

The system counts a sales order schedule line, quote or buyers agreement if the planned ship date is after the customer request date.

Order Sizing Exceptions

Select order sizing exceptions for planned supply orders only.

Order Quantity Below Minimum

The system counts a planned supply order if the order quantity on a supply order is less than the minimum order quantity specified in the sourcing option used to create the planned supply order.

Order Quantity Above Maximum

The system counts a planned supply order if the order quantity on a supply order is more than the maximum order quantity

specified in the sourcing option used to create the planned supply order.

Order Quantity Is Not An Increment The system counts a planned supply order if the order quantity on a supply order does not match the order increment specified in the sourcing option that is used to create the planned supply order.

Effectivity Date Exceptions

Production Option Is Not Effective The system counts a planned production order if the production option (BOM plus routing combination) is invalid at the production end date.

Component Is Not Effective The system counts a component requirement on a planned production order if the production start or end date is invalid because of effective dates. The BOM effectivity option on the planning instance determines whether a component is in effect at the start or end date.

Substitute Component Is Not Effective The system counts a substitute for a component requirement on a planned production order if the production start date or end date is invalid because of substitution effective dates. The BOM effectivity option on the planning instance determines whether a component is in effect at the start or end date.

Supply Occurs After Phase-Out Date The system counts a planned supply order if the order ends (end date for production, arrival date for transfers, and receipt date for POs) after an item's phase-out date.

General and Policy Exceptions

Invalid BOM Structure (invalid bill of material structure) The low-level code build detects violations. The system displays the number of items with BOM violations.

The system counts an item if its low-level code is set to -1 or 999.

Supplier Capacity Exceeded The system counts a capacity period for a supplier if the plan for an item exceeds the supplier's capacity.

Excess Limit Exceeded The system counts an item if its planned quantity on hand is greater than the specified excess limit at any time between the current time and the late fence.

Substitutions The system counts a component line on a production order if the component is listed as a substitute component, rather than the primary component that would normally be used.

General Filters

General filters are applicable to all of the exceptions.

Business Unit	The system selects only the exceptions for the specified business unit.
From Item ID and To Item ID	The system selects only the exceptions with item codes in the specified range.
From Item Configuration Code and To Item Configuration Code	A non-active field that is related to a deprecated product.
Category	The system selects only the exceptions for items associated with the specified category ID.
Family	The system selects only the exceptions for items associated with the specified family.
Utilization Type	The system selects only the exceptions for items associated with the utilization type.
Planner Code	The system selects only the exceptions for items associated with the specified planner code.
Customer	The system includes only those customer orders for the specified customer in the exception count.
Supplier ID	The system includes only the purchase transactions for the selected supplier in the exception count.
From Date and To Date	The system selects only the exceptions in the specified date range. For effectivity date violations and calendar violations, the system counts the exception if the exception date falls in the date range. For inventory policy violations, the system counts the exception only if the occurrence of the error falls within the date range for the corresponding item. For order sizing violations, the system counts the exception, if the receipt date is in the date range.
Planned By	The system selects only the exceptions for items associated with the specified planned-by types.
Default All	Click to reset the exceptions filter values to include all of the exception conditions for all of the order types over the widest possible date range.

Order Type Filters

Select the order types that you want the system to include when checking for exceptions.

Note: Forecasts and extra demand order types are not included here; these order types do not generate types of exceptions.

Search	When you have defined the selection criteria, click to access the Exceptions Summary page, where you can review the results of the search.
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Default All Values

Click to reset the exceptions filter values to include all of the exception conditions for all of the order types over the widest possible date range.

Exceptions - Calendar Exceptions Page

Use the Exceptions - Calendar Exceptions page (PL_RVW_EXCP_CAL) to review additional information about the calendar constraints.

Navigation

Click any link in the Filtered or Total column in the Calendar Exceptions group box on the Exceptions page.

Item ID

Click any value in this column to access the Material Workbench - Summary page, where you can analyze the material plan for the item and resolve item violations manually.

See [Using the Material Plan Workbench](#).

Order Date/Time

Displays the ship date or receipt date, depending on the type of exception.

Order Type

Displays the type of order with a calendar exception.

Order ID

Click any value in this column to access the corresponding Refine Plan Details page for the order type. For example, suppose that the order type is *Material Stock Request*, you can click the Order ID value to access the Refine Plan - Stock Requests page, where you can maintain information about internal and external demand orders on an inventory business unit, such as planning parameters, dates, and quantities.

Frozen

Select to indicate that the status of the order is frozen; the system does not reschedule frozen orders when solving for material plans.

Priority Rank

Displays a numeric value ranging from 1 (highest priority) to 999 (lowest priority) used by the planning engine to determine the order in fulfilling the demand. The system reserves 0 as a priority value.

Destination Unit

If the order is a transfer order, this column displays the destination business unit.

Exceptions - Order Sizing Exceptions Page

Use the Exceptions - Order Sizing Exceptions page (PL_RVW_EXCP_ORDSZ) to review additional information about the order sizing exceptions.

Navigation

Click any link in the Filtered or Total column in the Order Sizing Exceptions group box on the Exceptions page.

Item ID

Click any value in this column to access the Material Workbench Summary page, where you can analyze the material plan for the item, navigate to the order maintenance page for the corresponding order, and resolve item violations manually.

See [Using the Material Plan Workbench](#).

Start Date/Time and End Date/Time

- For production orders, these dates correspond to the start and end dates of the production order.
- For POs, these dates correspond to release and receipt dates.
- For transfer orders, these dates correspond to the ship and arrival dates.

Order Type

Displays the type of supply order.

Order ID

Click any value in this column to access the corresponding Refine Plan Details page for the order type. For example, suppose that the order type is *Material Stock Request*, you can click the order ID value to access the Refine Plan - Stock Requests page, where you can maintain information about internal and external demand orders on an inventory business unit, such as planning parameters, dates, and quantities.

Frozen

If selected, indicates that the status of the order is frozen; the system does not reschedule frozen supply orders when solving for material plans.

Min Order Quantity (minimum order quantity)

Displays the minimum amount that can be placed on the order.

Max Order Quantity (maximum order quantity)

Displays the maximum amount that can be placed on the order.

Order Multiple

Displays the multiple that the system uses to determine an order quantity. For example, suppose that you have a demand for 28 and the multiple is 10, then the system generates a planned supply order for 30.

Exceptions - Effectivity Date Exceptions Page

Use the Exceptions - Effectivity Date Exceptions page (PL_RVW_EXCP_EFFTV) to review additional information about the effectivity date exceptions.

Navigation

Click any link in the Filtered or Total column in the Effectivity Date Exceptions group box on the Exceptions page.

Order Type	Displays the type of supply order.
Order ID	Click any value in this column to access the corresponding Refine Plan Details page for the order type. For example, suppose that the order type is <i>Material Stock Request</i> , you can click the Order ID value to access the Refine Plan - Stock Requests page, where you can maintain information about internal and external demand orders on an inventory business unit, such as planning parameters, dates, and quantities.
Frozen	Select to indicate that the status of the order is frozen; the system does not reschedule frozen demand when solving for material plans.
Start Date/Time and End Date/Time	<ul style="list-style-type: none"> For production orders, these dates correspond to the start and end dates of the production order. For POs, these dates correspond to release and receipt dates. For transfer orders, these dates correspond to the ship and arrival dates.
Item ID	<p>Click any value in this column to access the Material Workbench - Summary page, where you can analyze the material plan for the item, navigate to the order maintenance page for the corresponding order, and resolve item violations manually.</p> <p>See Using the Material Plan Workbench.</p>
BOM Code	<p>Displays the BOM identifier for the production option.</p> <p>Production options can be predefined or created based on the defaults specified for the item attributes according to unit level.</p>
Routing Code	<p>Displays the routing identifier for the production option. If the corresponding item uses lead time instead of production routings, the system does not populate this field with a value.</p>

Exceptions - General and Policy Exceptions Page

Use the Exceptions - General and Policy Exceptions page (PL_RVW_EXCP_INVBOM) to review general and policy violation details.

Navigation

Click a link in the Filtered or Total column in the General and Policy Exceptions group box on the Exceptions page.

Item ID	Click any value in this column to access the Material Workbench - Summary page, where you can analyze the material plan for the item, navigate to the order maintenance page for the order, and resolve item violations manually.
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Reviewing Rescheduled Supply and Demand

This topic discusses how to review Rescheduled Supply and Demand.

Pages Used to Review Rescheduled Supply and Demand

Page Name	Definition Name	Usage
<u>Reschedule Search Page</u>	PL_RESCHED_SRCH	Define criteria to search for rescheduled orders.
<u>Reschedule - Production Page</u>	PL_RESCHED_PROD	Review rescheduled orders for production.
<u>Reschedule - Purchases Page</u>	PL_RESCHED_PURCH	Review rescheduled orders for purchases.
<u>Reschedule - Transfers Page</u>	PL_RESCHED_XFER	Review rescheduled orders for transfers.
<u>Reschedule - Sales Orders/Quotes Page</u>	PL_RESCHED_SOQT	Review rescheduled orders for sales orders and quotes.
<u>Reschedule - Buying Agreements Page</u>	PL_RESCHED_BA	Review rescheduled orders for buying agreements.
<u>Reschedule - Extra Demand Page</u>	PL_RESCHED_XDMD	Review rescheduled orders for extra demand.
<u>Reschedule - Stock Requests Page</u>	PL_RESCHED_STKR	Review reschedule orders for stock requests.

Common Elements Used in This Section

Line	Displays the order line number, which is used by POs, transfer orders, sales orders, buying agreements, and material stock requests.
Item ID	Appears on the Item tab and displays the item code produced by the corresponding production operation.
Remaining Quantity	Appears on the Item tab and displays the outstanding amount due from the production operation. The remaining quantity is dependant on the order type; generally, the remaining quantity represents the outstanding amount to be supplied for supply orders or the remaining amount to be shipped for demand orders.
Rescheduled Days In	If the order has been rescheduled to a date that occurs earlier than the original scheduled date, this field displays the number of days in advance of the original scheduled date.

Rescheduled Days Out

If the order has been rescheduled to a date that occurs after the original scheduled date, this field displays the number of days after the original scheduled date.

Schedule

Displays the schedule line number, which is used by POs, transfer orders, sales orders, buying agreements, and material stock requests when an order line has one or more receiving or shipping dates, and receiving or delivery addresses.

Reschedule Search Page

Use the Reschedule Search page (PL_RESCHED_SRCH) to define criteria to search for rescheduled orders.

Navigation

Supply Planning > Solve Plan > Analysis > Rescheduled Supply/Demand

Source Code

Include only those items associated with the specified source. Values are:

- *Make*: Include only items that you manufacture.
- *Buy*: Include only items that you purchase.

Select both options to include items that you manufacture and purchase.

Display Options

Select *Reschedules* and *Cancellations* to include these orders in the search results.

Reschedule - Production Page

Use the Reschedule - Production page .

Navigation

Supply Planning >Solve Plan >Analysis >Rescheduled Supply/Demand

Common Information**Production ID**

Displays the production ID that has been rescheduled. Click to access the Refine Plan Details page for the corresponding production ID.

Production Tab

Select the Production tab.

Status and Plan Status

Indicates the status of the production ID or production schedule in the production cycle. Values are:

- *Entered*: The system recognizes a production ID's quantity, start date, and due date, but the order has no operation list or component list. PeopleSoft Supply Planning considers entered production IDs and production schedules as supply, but does not plan for operations or components. In addition, the system creates a display-only output list for entered production. If production is for a single output item, the system generates an output list with the end item listed as the primary item.

You can change this status to *Firmed*, *Released*, or *Cancelled*.

This field value does not appear on the Planned Production component.

- *Firmed*: A firmed production ID or production schedule has a quantity, start date, and due date, but the BOM and routing are frozen. The component, operation, and output lists exist. You can change the output list. You cannot generate a picking plan for a firmed order.

You can change this status to *Released* or *Cancelled* only.

- *Released*: In this status, the production has a component list, an operation list, and an output—all of which can be modified. Additionally, each operation's start date, due date, and time are determined. Once released, changing a production ID can result in the deletion of the existing component list and operation list. The lists are then re-added based on the new information associated with the production ID.

You can change this status to *Cancelled* only.

This field value does not appear on the Planned Production component.

- *In Process*: When you have recorded production transactions such as issuing or consuming components and recording completions, scrap, or actual hours, the system automatically changes the production status to *In Process*.

You can change this status to *Cancelled* only.

This field value does not appear on the Planned Production component.

- *Canceled*: This status cancels existing production quantities associated with a production ID. You can cancel production if the production status is *Entered*, *Firmed*, or *Released*. You cannot cancel a production ID with subcontracted operations, if a PO has been generated against the production ID.

You can change this status back to its original status or to any status available to the original status. For example, suppose that the original status was *Firmed*, you can change the *Cancelled* status to *Firmed* or *Released*.

Original Start Date/Time and
Original End Date/Time

Displays the date and time that the transaction system intends to start and end the operation.

Planning Start Date/Time

Displays the current date that PeopleSoft Supply Planning intends to begin the operation.

Planning End Date/Time

Displays the current date that PeopleSoft Supply Planning intends to finish the operation.

Inventory Pegging

Select the Inventory Pegging Tab.

Peg Status

Displays the pegging status of the line item.

- *Unpegged* This line item does not have pegged demand.
- *Open* This line item is pegged to demand that has yet to be fulfilled.
- *Completed* This line item is pegged to demand that has been fulfilled

Peg Details

Click the link to display the pegged demand information. This column will only be available if the Peg Status is Open or Completed.

Reschedule - Purchases Page

Use the Reschedule - Purchases page (PL_RESCHED_PURCH) to review rescheduled orders for purchases.

Navigation

Supply Planning > Solve Plan > Analysis > Rescheduled Supply/Demand

Purchase Tab

Select the Purchase tab.

Purchase Order

Displays the rescheduled PO number. Click this value to access the Refine Plan Details page for the corresponding PO.

Distribution Line

Displays information regarding how the item quantity will be charged to the organization, as well as internal delivery locations. Distributions also contain interface information for PeopleSoft Inventory, Project Costing, Order Management, and

Asset Management. You can have more than one distribution for each schedule.

Due Date/Time

Displays the date and time that the order is due.

Planning Due Date/Time

Displays the current scheduled date that PeopleSoft Supply Planning intends to receive the distribution.

Item Tab

Select the Item tab.

Release Date/Time

Displays the date that you must dispatch the PO to receive the receipt by the due date and time.

Supplier Tab

Select the Supplier tab.

Supplier SetID

Displays the SetID in which the supplier information was defined.

Supplier ID

Identifies a specific supplier as defined on an item and supplier definition.

Supplier Location

Displays the supplier location associated with the item.

Reschedule - Transfers Page

Use the Reschedule - Transfers page (PL_RESCHED_XFER) to review rescheduled orders for transfers.

Navigation

Supply Planning > Solve Plan > Analysis > Rescheduled Supply/Demand

Common Information

Demand Source

Displays the source of the independent demand.

Order Number

Displays the unique order ID for the transfer. You can define order numbers manually or set up automatic numbering in PeopleSoft Inventory. If you use automatic numbering, PeopleSoft Inventory generates an order number based on the default sequence defined on the User Preferences - Inventory page; if no default sequence exists, the system generates a number based on the default sequence specified for material stock requests on the Automatic Numbering page.

Demand Line

In PeopleSoft Inventory, orders for stock consist of demand lines. A demand line is the smallest request for stock that various fulfillment processes can process.

If you can fulfill an order line with the available on-hand quantity in the business unit, the system assigns one demand line (line number 1), requesting the total quantity required to fulfill the order line. If you cannot fulfill the order line with the available on-hand quantity and partial quantities are allowed, the system generates a backorder (if you have elected to cancel backorders, the additional quantity requested is canceled).

The backorder process adds a demand line for the unfulfilled quantity; the only change in the demand key for the second demand line is the demand line number (line number 2).

See "Understanding Demand" (PeopleSoft FSCM 9.2: Inventory).

Demand Tab

Select the Demand tab.

InterUnit Status

Values are:

- *C* (canceled): The Interunit Status field is the only field available for entry. The value *O* (open) is the only other available option when the status is *C*.
- *O* (open): All of the maintainable fields are available for entry. The value *C* is the only other available interunit status value when the status is *O*.
- *P* (picked): The InterUnit Status and Requested Base fields are not available for entry.
- *I* (intransit): The Include Quantity and Consume Forecast fields are available for entry.
- *R* (received): The Include Quantity and Consume Forecast fields are available for entry.

Scheduled Date/Time

Date the transaction system expects to ship from the source business unit.

Planning Date/Time

Displays the current scheduled date that PeopleSoft Supply Planning intends to ship from the source business unit.

Supply Tab

Select the Supply tab.

Destination Unit

Displays the business unit from which the transfer originates.

Scheduled Arrival Date/Time

Date the transaction system expects to receive the transfer in the destination business unit.

Planning Arrival Date/Time

The current scheduled transfer arrival date to the destination business unit. The system validates this value against the receiving calendar.

Item Tab

Select the Item tab.

Remaining Demand

Displays the outstanding demand due from the source business unit.

Remaining Supply

Displays the outstanding supply expected at the destination business unit.

Reschedule - Sales Orders/Quotes Page

Use the Reschedule - Sales Orders/Quotes page (PL_RESCHEDED_SOQT) to review rescheduled orders for sales orders and quotes.

Navigation

Supply Planning > Solve Plan > Analysis > Rescheduled Supply/Demand

Common Information**Order Number**

Displays the unique order ID for the transfer. You can define order numbers manually or set up automatic numbering in PeopleSoft Inventory. If you use automatic numbering, PeopleSoft Inventory generates an order number based on the default sequence defined on the User Preferences - Inventory page; if no default sequence exists, the system generates a number based on the default sequence specified for material stock requests on the Automatic Numbering page.

Ship To

Displays the ship to customer.

Sales Order/Quote Tab

Select the Sales Order/Quote tab.

Kit

Displays the product kit code.

A product kit is a fixed set of components that are sold as a unit. A product kit is not a stockable inventory item-its components may or may not be.

PeopleSoft Supply Planning assumes that all of the kit components ship together-including configured or custom kits-in one sales order.

Note: All of the kits for a schedule must have the same ship date and time. If you change a kit ship date and time, the system updates the ship date and time of the other items in the kit.

Planning Ship Date/Time	Displays the current scheduled ship date that PeopleSoft Supply Planning intends to ship the schedule.
Scheduled Ship Date/Time	Displays the requested ship date or scheduled ship date, depending on how you defined this option for the planning instance. PeopleSoft Supply Planning attempts to ship on this date.
Scheduled Ship Date/Time	Displays the date that the transaction system expects to ship.

Reschedule - Buying Agreements Page

Use the Reschedule - Buying Agreements page (PL_RESCHEDED_BA) to review rescheduled orders for buying agreements.

Navigation

Supply Planning > Solve Plan > Analysis > Rescheduled Supply/Demand

Common Information

Contract ID Displays the rescheduled contract number. Click to access the Buying Agreements page, where you can review and maintain parameters for buying agreements.

See [Refining Order Management Details](#).

Ship To Displays the ship to customer.

Buying Agreement Tab

Select the Buyer Agreement tab.

Kit Displays the product kit code.

A product kit is a fixed set of components that are sold as a unit. A product kit is not a stockable inventory item; however, its components may be stockable.

PeopleSoft Supply Planning assumes that all of the kit components ship together—including configured or custom kits—in one sales order.

Note: All of the kits for a schedule must have the same ship date and time. If you change a kit ship date and time, the system also updates the ship date and time of the other items in the kit.

Planning Ship Date/Time	Displays the current scheduled ship date that PeopleSoft Supply Planning intends to ship the schedule line on the buying agreement.
Scheduled Ship Date/Time	Displays the date that the transaction system expects to ship.

Reschedule - Extra Demand Page

Use the Reschedule - Extra Demand page (PL_RESCHEDED_XDMD) to review rescheduled orders for extra demand.

Navigation

Supply Planning > Solve Plan > Analysis > Rescheduled Supply/Demand

Common Information

Sequence Number	The system has rescheduled the extra demand defined by this sequence number. Click to access the Refine Plan - Extra Demand page, where you can plan for unexpected lack of supply.
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Extra Demand Tab

Select the Extra Demand tab.

Scheduled Date/Time	Date the original extra demand was intended to ship from the source business unit.
Planning Date/Time	Displays the current scheduled date that PeopleSoft Supply Planning intends to ship the extra demand.

Reschedule - Stock Requests Page

Use the Reschedule - Stock Requests page (PL_RESCHEDED_STKR) to review reschedule orders for stock requests.

Navigation

Supply Planning > Solve Plan > Analysis > Rescheduled Supply/Demand

Common Information

Order Number	Displays the unique order ID for the transfer. You can define order numbers manually or set up automatic numbering in PeopleSoft Inventory. If you use automatic numbering, PeopleSoft Inventory generates an order number based on the default sequence defined on the User Preferences - Inventory page; if no default sequence exists, the system generates a number based on the default sequence specified for material stock requests on the Automatic Numbering page.
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Click the order number value to access the Refine Plan - Stock Requests page, where you can review and maintain information about internal and external demand orders on an inventory business unit, such as planning parameters, dates, and quantities.

Confirm

If selected, indicates that the specified quantity has been picked from the appropriate storage location. Picked lines must be confirmed before they are eligible for the Picking Confirmation process.

Stock Request Tab

Select the Stock Request tab.

Demand Line

In PeopleSoft Inventory, orders for stock consist of demand lines. A demand line is the smallest request for stock that various fulfillment processes can process.

If you can fulfill an order line with the available on-hand quantity in the business unit, the system assigns it one demand line (line number 1), requesting the total quantity required to fulfill the order line. If you cannot fulfill the order with the available on-hand quantity and partial quantities are allowed, the system generates a backorder (if you have elected to cancel backorders, the additional quantity requested is canceled). The backorder process adds a demand line for the unfulfilled quantity; the only change in the demand key for the second demand line is the demand line number (line number 2).

See "Understanding Demand" (PeopleSoft FSCM 9.2: Inventory).

Scheduled Date/Time

Date the transaction system expects to ship from the source business unit.

Planning Date/Time

Displays the current scheduled date that PeopleSoft Supply Planning intends to ship from the source business unit.

Details Tab

Select the Details tab.

Demand Source

Displays the source of the independent demand.

Shipped

If selected, indicates that the stock request has shipped.

Post Ship Complete

The system populates this field after a net change update, if the planning instance contains a material stock request that has shipped.

Reviewing Forecast Fulfillment

This topic provides an overview of forecast fulfillment and discusses how to review forecast fulfillment.

Pages Used to Review Forecast Fulfillment

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Forecast Fulfillment Search Page	PL_FCSTFULFIL_SRCH	Specify the search criteria that you want the system to use when returning forecast fulfillment information.
Forecast Fulfillment Summary Page	PL_FCST_FULFILLMNT	Review forecast tasks that are fulfilled, delayed, or canceled for a planning period.
Net Forecast Page	PL_FCSTFULFILL_DMD	Review adjusted forecast details. Forecast Fulfillment Summary Page

Understanding Forecast Fulfillment

Forecast fulfillment is the process PeopleSoft Supply Planning uses to meet forecasted demand when there is not enough supply to meet all of the demand at once. During forecast fulfillment, the system divides net forecasts into smaller increments that are associated with the original planning period. For example, each forecast is associated with a planning period, and planning periods are defined as daily, weekly, or monthly. The sum of the smaller increments meets the forecasted demand. Forecast fulfillment violations represent the number of these smaller increments that have been delayed or canceled.

Using the Review Forecast Fulfillment component, you can:

- Review the results of the forecast proration, consumption, and adjustment processes.
- Review the fulfillment size breakdown of the adjusted forecast.
- Review the impact of the solvers on the adjusted forecast.
- Refine the adjusted forecast and modify the manner in which solvers interact with the forecast.

The Review Forecast Fulfillment component complements the Material and Capacity workbenches. Determined by the search criteria that you define, the system displays a list of items with forecast fulfillment information.

Forecast Fulfillment Search

After you define criteria, the system displays a list of items that meet the search criteria that you entered. You can:

- Click any link in the Item ID column to review forecast fulfillment details for an individual item.
- Populate the selection check box for multiple items, and click the Generate Summary button to review forecast fulfillment details for a group of items.

- Select all of the items in the list and then click the Generate Summary button to review the details for all of the items that meet the search criteria.

Forecast Fulfillment Summary

You can review forecast fulfillment summary data for items that have completed the forecast consumption phase. You can also navigate to view forecast fulfillment details, maintain adjusted forecasts, and review the supply chain details supporting the forecast.

Forecast Fulfillment Search Page

Use the Forecast Fulfillment Search page (PL_FCSTFULFIL_SRCH) to specify the search criteria that you want the system to use when returning forecast fulfillment information.

Navigation

Supply Planning > Solve Plan > Analysis > Forecast Fulfillment

Fulfillment Status	Include only items that have at least one forecast matching the status selected. You can select any combination of the status check boxes.
Start Date	Include only items with forecasts that occur at least partially after the specified start date.
End Date	Include only items with forecasts that occur at least partially before the specified end date. If you specify a start date and an end date, the start date must occur before the end date.
Search	Click to retrieve all of the items that meet the specified criteria. Items that meet the criteria appear in the Item List group box.
Clear	Click to delete all of the specified search criteria.
Select All	Click to select all of the items that appear in the Item List group box.
Show Selected	If you have selected multiple items in the Item List group box, you can click this button to access the Forecast Fulfillment Summary page, where you can review the forecast fulfillment details for all of the items that meet the search criteria.
Selection (check box)	Select those items that you want to include for review on the Forecast Fulfillment Summary page.

Forecast Fulfillment Summary Page

Use the Forecast Fulfillment Summary page (PL_FCST_FULFILLMNT) to review forecast tasks that are fulfilled, delayed, or canceled for a planning period.

Navigation

Supply Planning > Solve Plan > Analysis > Forecast Fulfillment > Forecast Fulfillment Summary

Start Date/Time	Include only items with forecasts that occur at least partially after the specified start date.
End Date/Time	Include only items with forecasts that occur at least partially before the specified end date. If you specify a start date and an end date, the start date must occur before the end date.
Forecast Adjustment Action	Displays the forecast adjustment action associated with the item. The Forecast Adjustment phase is part of the Forecast Consumption process.

Forecast Summary

Select the Forecast Summary tab.

Forecasted Quantity	Displays the PeopleSoft Publish Forecast tables forecast quantity converted to PeopleSoft Supply Planning forecast quantity, based on attributes such as planning bucket size, forecast percentages, and demand fence. This forecast data originates with Demantra Demand Management.
Net Forecast Quantity	Displays the remaining forecast quantity after the system runs the Forecast Proration and Consumption phases.
Adjusted Forecast Quantity	Displays the net forecast quantity after the system runs the Forecast Adjustment phase. Click any link in this column to access the Net Forecast page, where you can review the adjusted forecast details.

Fulfillment Information

Select the Fulfillment Information tab.

Filled Quantity	Displays the net forecast quantity to be supplied early or on time. The system calculates this value by summing the smaller forecast increments that are supplied on time.
Delayed Quantity	Displays the net forecast quantity to be supplied late. The system calculates this value by summing the smaller forecast increments that are delayed.
Canceled Quantity	Displays the net forecast quantity that will not be supplied. The system calculates this value by summing the smaller forecast increments that are canceled.

Consumption Information

Select the Consumption Information tab.

Customer Orders Consumed	Displays the quantity of sales orders, quotes, and buying agreements netted against the forecasted quantity during the
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forecast consumption process. The system displays this value only if consumption occurs after allocation of forecasts from PeopleSoft Publish Forecast table periods to PeopleSoft Supply Planning periods.

Transfer Orders Consumed

Displays the quantity of transfer orders and planned transfer orders netted against the forecasted quantity. The system displays this value PeopleSoft Publish Forecast table periods to PeopleSoft Supply Planning periods.

Stock Requests Consumed

Displays the quantity of stock requests netted against the forecasted quantity. The system displays this value only if consumption occurs after allocation of forecasts from PeopleSoft Publish Forecast table periods to PeopleSoft Supply Planning periods.

Production Consumed

Displays the calculated production demand netted against the forecasted quantity. The system displays this value only if consumption occurs after allocation of forecasts from PeopleSoft Publish Forecast table periods to PeopleSoft Supply Planning periods.

Extra Demand Consumed

Displays the extra demand netted against the forecasted quantity.

Creating Supply and Demand Analysis Reports

This topic provides an overview of PeopleSoft Supply Planning supply and demand analysis reports, and discuss how to define criteria for the Detail Resources report.

Pages Used to Create Supply and Demand Analysis Reports

Page Name	Definition Name	Usage
Planned Slow Moving Inventory Report	PL_SLOWMOVG_REQ	Generate a report for a specified planning instance that lists items with on-hand inventory and little or no demand. Understanding PeopleSoft Supply Planning Supply and Demand Analysis Reports
Excess Stock Report	PL_XSTOCK_REQ	Generate a report listing the quantity and value of on-hand stock levels that are above the excess and safety stock levels at period end. Understanding PeopleSoft Supply Planning Supply and Demand Analysis Reports

Page Name	Definition Name	Usage
Projected Stock Out Report	PL_STOCKOUT_REQ	Generate a report that calculates the date at which an inventory level will fall to zero (or near zero). Understanding PeopleSoft Supply Planning Supply and Demand Analysis Reports
Planning Reschedule Report	PL_RESCHED_REQ	Generate a report that lists all of the reschedule messages, including production, PO, transfer, sales order and quote, buying agreement, extra demand, and stock request messages. Understanding PeopleSoft Supply Planning Supply and Demand Analysis Reports
Detail Resources Page	SPL_DETAIL_RES_REQ	Generate a report that lists the number of machines, crews, and tools used in a production process.

Understanding PeopleSoft Supply Planning Supply and Demand Analysis Reports

PeopleSoft Supply Planning delivers these supply and demand analysis reports:

Slow Moving Inventory Report

The Slow Moving Inventory report highlights items that you have on hand but for which there is little or no demand. The report also includes inventory valuation. When you run this report, the system selects those items that meet the specified criteria (within the selected range). The system will print the number of inventory transactions, the demand value transacted per item, and the number of units transacted.

The Slow Moving Inventory report displays planned and actual supply and the on-hand quantity that existed at the time that the planning instance was last loaded into PeopleSoft Supply Planning, but it ignores closed and canceled supply and demand.

Excess Stock Report

The Excess Stock report highlights the quantity and value of on-hand stock levels above the excess and safety stock level at period end (within the date range that you specify). This report assists the financial planner interested in the stock levels and stock value above the defined excess and safety levels.

A safety level is the preferred level to which you want to increase stock when you violate the safety stock level. For example, suppose that stock falls below 45, then you might want to create enough supply to bring the level up to 100. Excess level is the preferred level to which you want to decrease stock when you violate the excess stock limit. For example, suppose that stock rises above 10,000, you can bring it down to 7,500.

You can define safety and excess limits on the Define Business Unit Item - Planning: Fences/Lead Time page and on the Stocking Periods page. The system uses the safety and excess values that you define

on the Define Business Unit Item component as default values if you do not define those values on the Stocking Periods page.

Projected Stock Out Report

The Projected Stock Out report calculates the date at which an inventory level will fall to zero (or near zero), based on actual and planned demand and actual supply.

Reschedule Report

The Reschedule report displays all of the planned reschedules, including transfers, production, POs, and sales orders, within a selected date range and for a specific planning instance.

Detailed Resources Report

The Detailed Resources report provides visibility to detail resources—machines, crews, and tools—within a planning instance. Use this report to review detail resource usage based on scheduled and planned production. Using this report, you can review the maximum usage of a machine, crew, or tool for any period of time.

Detail Resources Page

Use the Detail Resources page (SPL_DETAIL_RES_REQ) to generate a report that lists the number of machines, crews, and tools used in a production process.

Navigation

Supply Planning > Solve Plan > Reports > Detail Resources

Report Print Options

Print Option	<p>Values are:</p> <ul style="list-style-type: none"> • <i>Resource Summary</i>: Print the maximum resource usage that occurs for a particular period. • <i>Resource Detail</i>: Print the resource usage for each individual production operation. • <i>Summary with Detail</i>: Print the maximum resource usage that occurs for a particular period and the resource usage for each individual production operation.
Skip If No Detail	Select if you do not want to display resource usage for each individual production operation on the Resource Summary report when no resource usage exists.
Start Date Option and Offset	<p>Define the date on which you want to generate the report.</p> <p>You can define a specific date or a number of offset days from the report run date. Use the Offset feature to run the report on an ongoing basis without modifying the run control.</p>
Hourly Buckets	Define the number of hourly buckets that you want to appear.

Hours per Bucket	Define the size of each hourly bucket.
Start Time	Specify the time on the start date that you want the first hourly bucket to begin.
Daily Buckets	Define the number of daily buckets that you want to appear.
Weekly Buckets	Define the number of weekly buckets that you want to appear.
Monthly Buckets	Define the number of monthly buckets that you want to appear.
End Date Option and Offset	<p>Define the end date and time that you want to generate the report.</p> <p>You can define a specific date or define a number of offset days from the report run date. Use the Offset feature to run the report on an ongoing basis without modifying the run control.</p> <p>This option is available only when you are printing the resource detail.</p>

Report Filter Criteria

Business Unit	Specify a manufacturing business unit. This field is optional.
Tool ID	Select to print data for all of the tools, a single tool, or a range of tools.
Machine Code	Select to print data for all of the machines, a single machine, or a range of machines.
Crew Name	Select to print data for all of the crews, a single crew, or a range of crews.
Report Option for Crew	Specify whether reporting is done by crews or by individuals (calculated as crews multiplied by crew size).
Minimum Tool, Machine, and Crew Usage	Print only the data where the usage is greater than or equal to the number that you specify in this field.

Managing Material Plans

Understanding Material Plans

The material plan enables you to manage inventory levels, schedules, and availability of selected items, whether manufactured, purchased or transferred. The material plan is driven from setup and from transactional data from PeopleSoft Supply Chain Management, including PeopleSoft Inventory, Order Management, Purchasing, and Manufacturing. PeopleSoft Publish Forecast tables provide the forecasts and inventory stocking policies to enable PeopleSoft Supply Planning to calculate material plans.

After you generate a material plan, you can use inquiry components to review the plans, and use the Material Plan Workbench and Material Plan Detail pages to adjust the plan. Additionally, you can use the Buyer Workbench to review the material plan from a purchasing and supplier perspective, and adjust the plan for one or more suppliers.

Common Elements Used to Understand Material Plans

Beginning Start Date	Define how the system determines the start date for the time periods. Values are <i>Beginning of Period</i> and <i>Start Date Entered</i> . If you use period sizes of weeks or months, and select <i>Beginning of Period</i> , the system sets the start date to the beginning of the period (Sunday for weekly buckets, the first of the month for monthly buckets)
Clear	Click to clear all of the field values in the Search Criteria group box.
Clear All	Click to clear the item selection check box for all of the items that appear in the Item List group box.
Decimal Positions	Define the decimal precision that you want to use when displaying quantities in workbenches and inquiries.
Display Row Types	<p>Click to access the Display Row Types page, where you can modify which row types appear on the workbench summary pages, and the order in which they appear. Define the row types that initially appear on the workbench summary pages by associating row types with a template on the Define Display Templates page, and selecting that template in the Template field in the Display Options group box.</p> <p>You can access the Display Row Types page on all of the workbench and review pages where row types are used, including the Material Plan Workbench, Review Material</p>

	Summary Plan, Buyer Workbench, and Review Buyer Purchases pages.
Graph	Click this button after you select a graph type to chart the information for the specified row types.
Graph Type	Select a method for displaying the row type chart data.
Generate Summary	<p>From the Material Workbench Search, Review Material Summary, Buyer Workbench, and Review Buyer Purchases pages, you can click this button to view the combined row type totals for all of the items that you selected.</p> <p>For example, if you select multiple items in the Item List group box on the Material Workbench Search page, you can click this button to access the Material Workbench Summary page, where you can view the combined row type totals for all of the items that you selected, as well as row type totals for each item ID.</p>
Number of Periods	<p>Define the number of buckets that the system calculates and displays within the Material Plan Workbench, Review Material Plan Summary, Buyer Workbench, and Review Buyer Purchases pages.</p> <p>The system initially populates this field with the value that you entered for the Default Number of Periods field on the Define Display Template page. The number of periods that you define determines the number of tabs that appear in the summary.</p>
Past Due	Summarizes information prior to the start date specified within a workbench or review page. When the system initially displays the summary information, it uses the current date as the default start date. You can override this value on the corresponding summary pages.
Period Duration	Define the bucket size for which you want to generate and review summary information. Values are <i>Day</i> , <i>Week</i> , or <i>Month</i> .
Refresh	Click to recalculate the results in the Item Summary group box (on the workbench pages), Plan Summary group box (on the Buyer Workbench PL Workbench Summary page), or the Order Details group box (on the Material Plan Details - Search page) when you change any of the display options.
Row Type	<p>Represents a type of planning data. The data can be cumulative or calculated on a period-by-period basis. Click any link-enabled quantity field for a row type to access a detailed list for that period.</p> <p>Row types that appear as default values on summary, based on the display template or display template overrides that you specify.</p>

Search	Click to display all of the items that meet the criteria that you defined in the Search Criteria group box.
Select All	Click to select all of the items that appear in the Item List group box.
Selection (check box)	Enables you to specify which items to include in the Material Plan Workbench, Material Plan Summary, Buyer Workbench, and Buyer Purchases pages.
Show Demand	Click to access the corresponding Show Demand page, where you can view a list of orders that use the items supplied from the selected order.
Show Details	Select to display individual item summaries on the workbench summary pages.
Show Supply	Click to access the corresponding Show Supply page, where you can view a list of orders, the outputs of which are used to satisfy the demands of the selected order.
Start Date	Define the first date from which you want to begin reviewing information. When using period sizes of weeks or months, you can define the start date to move automatically to the beginning of the period (Sunday for weekly buckets, the first of the month for monthly buckets). The system initially uses the current date as the default start date. The system buckets data prior to the start date into the Past Due column of the summary results.
Summarize Selected by Item ID	<p>Enables you to view information summarized for the item across business units when working with a multiple site planning instance (multiple business units).</p> <p>Enter the item search criteria, then select the corresponding check boxes for each item that you want to review. The system displays an item list that may contain the same item in different business units. Select each occurrence of the item and select the Summarize Selected by Item ID field to generate a summary across business units for the item.</p>
Summarize Selected by UOM (summarize selected by unit of measure)	Enables you to select multiple items that have the same unit of measure to generate a summary of inventory activity for all of the selected items. For example, you have an item family called BIKES. If in the item search criteria that you elected includes only those items belonging to the item family BIKES, you could select all of the returned items, then generate a summary by unit of measure to display summarized inventory information at the BIKE level.
Template	<p>Indicates which display template the system uses when creating workbench summaries within PeopleSoft Supply Planning.</p> <p>You can associate a template to user preferences or installation options for defaulting purposes. You can override this value</p>

with a different valid template, and change the rows, sort order, and chart characteristics for the template while in a workbench.

Using the Material Plan Workbench

This topic provides an overview of the Material Plan Workbench components, and discusses how to use the Material Plan Workbench.

Pages Used to Maintain the Material Plan

Page Name	Definition Name	Usage
<u>Material Workbench Search Page</u>	PL_WBENCH_SRCH	Define item search criteria used to generate a list of items from which you can review material plans.
<u>Material Workbench Summary Page</u>	PL_WBENCH_SUMMARY	Analyze the horizontal material plan summary for an item or group of items and drill down to plan details.
<u>Material Workbench Drill Down Detail Page</u>	PL_WB_MAT_DRILLDWN	Add planned orders to the planning instance, including planned purchase, production, transfer orders (from the supply based rows), and extra demand (from the demand based rows). Access the corresponding Refine Plan pages for orders that appear on the drill down pages. As these detail pages display period details for the corresponding row type, the information that appears and the functionality available is determined by the row type from which you accessed the page.

Understanding the Material Plan Workbench

The Material Plan Workbench presents traditional horizontal plan information in user-defined periods, and enables you to drill into the details behind the summarized information, make manual changes to the plan, and view the impacts as soon as they are applied. Display templates that you define control the data that appears in workbench summaries and charts. You can associate display templates to user defaults to meet the needs of multiple users.

Material Workbench Search

Use the Material Workbench search page criteria to generate a list of items for which you want to review horizontal plan information. Specify an item and a business unit to access the workbench summary for the item. Leave the item, the business unit, or both fields blank to generate a list of items based on the other criteria specified. Select one or more items from the generated list to review. When selecting multiple items, you can generate a summary by item or by unit of measure. This enables you to view, for example, the summarized material position for an item across business units or summarized information for an item

group. The search page also enables you to specify the display template that you want to use to generate the summary.

Material Workbench Summary

The Material Workbench Summary provides you with a horizontal aggregate (bucketed) view of supply and demand for a business unit item, including row types, past-due quantities, and dates that represent the period duration. The maximum number of periods for the summary is 52. To maintain data for the plan, select the row type in the column of the corresponding date that you want to work with to access additional information and links that you can use to change data for scheduled receipts and planned orders.

Note: When you access the Material Plan Summary page from the Review Material Plan Summary menu, you can review aggregate (bucketed) supply and demand for a business unit item. You cannot, however, modify the plan when you access the Material Plan Summary page from the Review Material Plan Summary menu. To make changes to the material plan, access the Material Plan Summary page through the Material Workbench component.

Material Workbench Drill Down Detail

Row types with link-enabled values in the Material Workbench Item Summary grid have corresponding pages that provide details for the contents of the summarized bucket. Click the values in these rows to access Material Workbench additional detail pages, where you can, for example, add new orders to the planning model, drill into a specific order to make date changes, freeze orders, and cancel orders manually.

Material Workbench Search Page

Use the Material Workbench Search page (PL_WBENCH_SRCH) to define item search criteria used to generate a list of items from which you can review material plans.

Navigation

Supply Planning >Solve Plan >Material >Material Plan Workbench

Image: Material Workbench Search page

This example illustrates the fields and controls on the Material Workbench Search page. You can find definitions for the fields and controls later on this page.

The screenshot shows the Material Workbench Search page. It is divided into three main sections: Search Criteria, Display Options, and an Item List.

Search Criteria: This section contains several input fields for filtering results:

- *Planning Instance: TEST_PLAN
- *Template: MASTER
- Business Unit: US008
- Family: (empty)
- Item ID: (empty)
- Utilization Type: (empty)
- Planner Code: LK
- Category: (empty)
- Item Group: (empty)
- Configuration Code: (empty)

 Below these fields are three checkboxes: "Planned By" with sub-checkboxes for "Distribution Plan", "Master Plan", and "Material Plan". At the bottom of this section are "Search" and "Clear" buttons.

Display Options: This section includes:

- Start Date: 01/14/2014
- *Beginning Start Date: Beginning of Period
- Period Duration: Week
- Number of Periods: 15
- Decimal Positions: 0

 Below these are checkboxes for "Select All" (checked), "Clear All", and buttons for "Generate Summary", "Summarize by UOM", "Summarize by Item ID", and "Show Detail Values".

Item List: This section displays a table of search results. The table has columns for Unit, Item ID, and Description. The results are:

Unit	Item ID	Description
US008	GR8004	Crank Arm, Sugishita IG-90
US008	GR8005	Crank Arm, Campani
US008	GR8006	Sealed Bottom Bracket

 Above the table are tabs for "Item", "Attributes", and "Configuration Code". To the right of the table are links for "Personalize", "Find", "View All", and pagination controls showing "1-64 of 64".

Enter search criteria to filter the results, and click the Search button to display the results on this page. Click the Clear button to clear all of the criteria. You can specify which display template to use or click the Display Row Types button to override the settings for the display template that appears. If you select the check box for multiple items, click the Generate Summary button to generate an aggregate summary for the selected items and drill down to the Material Workbench Summary page, where you can review the item details. For single items, click any link in the Item ID column to review the corresponding item details. Select Summarize by UOM or Summarize by Item ID to summarize the results for multiple items by unit of measure or by item ID, respectively.

When summarizing data across items, select the Show Detail option to display the summary for each item. If you do not select the Show Detail option, a summary for all of the items appears on the Material Workbench Summary page, but no item-specific summary appears. Access the Material Workbench Drill Down pages to review summary details for individual items.

Note: Multiple views of the item list are available by selecting the tabs in the scroll area. Each tab includes additional information related to the item, including corresponding business units, item descriptions, and item attributes,

Display Options

Define how the search results appear on the Material Workbench Summary page. The system populates the fields in this group box with default values that it derives from the display template that you specify in the Template field.

Material Workbench Summary Page

Use the Material Workbench Summary page (PL_WBENCH_SUMMARY) to analyze the horizontal material plan summary for an item or group of items and drill down to plan details.

Navigation

click any link in the Item ID column or select multiple items and click the Generate Summary button on the Material Workbench Search page

Image: Material Workbench Summary page

This example illustrates the fields and controls on the Material Workbench Summary page. You can find definitions for the fields and controls later on this page.

Material Workbench Search

Material Workbench Summary

Display Options

Refresh

Plan Summary

Find

First

1 of 1

Last

Business Unit US008

Unit Cost 21.4500

Item ID GR8010

Shifters, RapidX 8 Speed

Standard UOM EA

Chart for:

Item Summary

Personalize

Find

1-11 of 11

Last

1

2

3

...

Row Type	Past Due	01/26/2014	02/02/2014	02/09/2014	02/16/2014	02/23/2014	03/02/2014
Starting On Hand	0	0	100	0	125	0	150
Actual Forecast	0	0	100	0	125	0	150
Net Forecast	0	0	100	0	125	0	150
Independent Demand	0	0	0	0	0	0	0
Dependent Demand	0	0	0	0	0	0	0
Total Demand	0	0	100	0	125	0	150
Planned On Hand	0	100	0	125	0	150	0
Available To Promise	0	0	0	0	0	0	0
Cumulative ATP	0	0	0	0	0	0	0
Scheduled Receipts	0	100	0	125	0	0	0
New Planned Orders	0	0	0	0	0	150	0

Note: You cannot maintain plans directly from the Material Workbench Summary page. You can drill down to modify the material plan details related to the summary information. Those changes appear when you return to the Material Workbench Summary page. When drilling down to material plan details from the Review Material Plan Summary page, the detail pages are display only.

Display Options

You can override the display template value that you defined on the Material Workbench Search page, specify a start date, start date options, number of periods, and a decimal precision to use. To override the values that you entered on the Material Workbench Search page, enter new values on this page and click the Refresh button to display summaries that include the new display options.

Chart For

Use this section to display a graphical view of the summarized information, based on the charting options associated with the rows in the summary. The system uses the default chart type and chart rows in the chart that you defined on the display template. You can override the chart type. If you change the data

included in the chart, including any display option information or chart type, you must click the Graph button to regenerate the chart. The system uses the periods in the horizontal summary for the chart periods.

Item Summary

Displays the horizontal plan information based on the items that you selected and display template that you specified. The item summary displays the rows and bucketed material plans for the items selected. If you generated summaries across items (either by unit of measure or by item ID) the summarized information appears first. If you selected the Show Detail option, the system displays individual item summaries in subsequent grids.

Each grid provides a Chart For section. You can drill down from all of the rows that are based on individual orders. System-calculated rows, such as Planned On Hand, Periods of Supply, and Available to Promise, are calculated using the other row type information. The system sequences item summaries in ascending order based on item and business unit.

Note: When calculating values for row types, the system ignores demand and supply where the Include Quantity Flag (INCL_QTY_FLG) is not equal to Y. Additionally, the system does not include canceled or closed orders in the summary bucket calculation, but displays canceled and closed orders in detail drill down pages.

Related Links

[Defining Display Templates](#)

[Defining Display Row Types](#)

Material Workbench Drill Down Detail Page

Use the Material Workbench Drill Down Detail page (PL_WB_MAT_DRILLDOWN) to add planned orders to the planning instance, including planned purchase, production, transfer orders (from the supply based rows), and extra demand (from the demand based rows).

Use the corresponding Refine Plan pages for orders that appear on the drill down pages. As these detail pages display period details for the corresponding row type, the information that appears and the functionality available is determined by the row type from which you accessed the page.

Navigation

Click a link-enabled value for a row type in the Item Summary grid on the Material Workbench Summary page to access the corresponding details page.

Note: The Material Workbench Drill Down Detail page (PL_WB_MAT_DRILLDOWN) is dynamic. The information and page name that appears changes depending on the access point. For example, you can click a value in the New Planned Orders row type to access the New Planned Orders Drill Down page, where you can review item quantities, add planned purchase, production, and transfer orders, and view supply and demand pegging details.

A Material Workbench Drill Down page displays period details for the corresponding row type. On this page, you can add planned orders to the planning instance, including planned purchase, production, and transfer orders (when you access this page from a supply-based row type) and extra demand (when you

access this page from a demand-based row). You can also drill down into the corresponding Refine Plan page for an order when it appears on a Material Workbench Drill Down page.

Here is a list of descriptions of the Material Workbench Drill Down pages:

Actual Forecast	Forecast input to PeopleSoft Supply Planning from PeopleSoft Publish Forecast tables and other products.
Buying Agreements	Actual buying agreements in the execution system and seen as demand.
Extra Demand	Simulated demands only visible to planning.
Net Forecast	Forecast remaining as demand once the forecast consumption process has occurred.
Planned Production Demand	Production component requirements only visible to planning and seen as demand.
Planned Transfer Demand	Interunit transfers only visible to planning and seen as demand in the source business unit.
Sales Orders/Quotes	Actual sales orders and quotations in the execution system and seen as demand.
Scheduled Production Demand	Actual production component requirements in the execution system and seen as demand.
Scheduled Transfer Demand	Actual interunit transfers in the execution system and seen as demand in the source business unit.
Stock Requests	Actual stock requests in the execution system and seen as demand.
Planned Production	Production only visible to planning and seen as supply.
Planned Purchases	Purchases only visible to planning and seen as supply.
Planned Transfers	Interunit transfers only visible to planning and seen as supply in the destination business unit.
Scheduled Production	Actual production outputs in the execution system and seen as supply.
Scheduled Purchases	Actual purchases in the execution system and seen as supply.
Scheduled Transfers	Actual interunit transfers in the execution system and seen as supply in the destination business unit.
Customer Orders	Sales orders, quotes, and buying agreements.
Dependent Demand	Scheduled production demand, planned production demand, scheduled transfer demand, and planned transfer demand.

Independent Demand	Sales orders, quotes, buying agreements, stock requests, and extra demand.
Transfer Demand	Scheduled transfer demand and planned transfer demand.
New Planned Orders	Planned production, planned purchases, and planned transfers.
Production Supply	Scheduled production and planned production.
Purchase Supply	Scheduled purchases and planned purchases.
Scheduled Receipts	Scheduled production, scheduled purchases, and scheduled transfers
Transfer Supply	Scheduled transfers and planned transfers.
Total Supply	Scheduled production, scheduled purchases, scheduled transfers, planned production, planned purchases, and planned transfers.
Total Demand	Net forecast, sales orders, quotes, buying agreements, stock requests, extra demand, scheduled production demand, planned production demand, scheduled transfer demand, and planned transfer demand.

Related Links

[Refining Plan Definition Details](#)

Reviewing Material Plan Details

This topic provides an overview of the Material Plan Details components, and discusses how to review Material Plan detail.

Pages Used to Review Material Plan Details

Page Name	Definition Name	Usage
Material Plan Detail Search Page	PL_MAT_DETAIL_SRCH	Define item attribute selection criteria to generate an item list or identify a specific item to review the plan details.
Material Plan Detail Page	PL_MAT_DETAIL	Review a time-phased view of the supply and demand for an item within a planning instance.

Understanding the Material Plan Detail

The Material Plan Detail displays the time-phased sequence of supply and demand for an item. The supply and demand information appears with the running balance for a single inventory item. You can maintain existing orders, add new orders for an item, or review time-phased information in a graphical format.

Note: You can also access the material plan using the Review Material Plan components, which presents navigation and information in the same manner as the Material Plan Detail and Material Workbench components. However, the Review Material Plan components are inquiry components; you cannot add new orders or modify existing orders.

Material Plan Detail Search Criteria

Material Plan Detail selection criteria are item attributes that you can use to limit the selection list. Of the attributes, Planning Instance is the only required field. To limit the number of items the system returns, enter other search criteria. All of the fields (except for the Business Unit field) support wild card searching with the asterisk (*) or the percentage symbol (%) to enable you to perform partial searches. When you click the Search button, the system returns all of the items that meet the specified criteria, sorting by item, then by inventory business unit.

Material Plan Detail

The Material Plan Detail page consists of these sections:

Item Details

Displays the item selected from the item list on the Material Plan Detail Search page. To display a different item, you can enter new values in the Business Unit, *Item ID*, field and click the Refresh button to display the corresponding item details.

The system also displays the standard unit of measure, the starting inventory quantity on hand balance, and the Safety Stock field, which indicates whether an item includes stocking period information. Click Review Item to view other item details.

Display Options

Contains the same fields as the Display Options group box on the Material Plan Detail Search page. You can populate any of these fields on either page to limit the amount of data presented on the Material Plan Detail page. When you change display options, click the Refresh button to update the order details list.

The buttons that appear below the Display Options group box enable you to:

- Refresh the order details.
- Go to next item in the item list.
- Go to previous item in the item list.
- Add extra demand.
- Add planned production.
- Add planned purchases.
- Add planned transfers.

Chart For

Use to generate a graphical representation of the time phased material plan details. You can specify the chart type and period duration, as well as:

- Select Show Balance to graph the balance at the end of each period. The smallest level of granularity for charting purposes is a daily bucket.
- Select Show Safety Stock to graph the stocking periods safety stock levels for the item as of the end of the period.
- Select Show Excess Inventory to graph the excess inventory level as of the end of the period.
- Select Show Demand to graph the total outstanding demand for the period.
- Select Show Supply to graph the total outstanding supply for the period.

Note: The system does not initially chart any data when you first access the Material Plan Detail page. To create a graph, select a graph type and period duration, select the type of data that you want to graph, and click the Graph button. The system charts time-phased values based on the balance at the end of each period as specified by the period duration.

Order Details

Displays a time-phased view of the plan. The Starting Balance row displays the total outstanding demand quantity prior to the start date, the total outstanding supply quantity prior to the start date (including quantity on hand), and the starting inventory position based on these two quantities. Each subsequent row displays the next demand or supply in time sequence, along with the inventory position as a result of that order. All of the supplies and demands between the start date and end date appear. When a supply and a demand exist for the same date and time, the supply appears first.

Material Plan Detail Search Page

Use the Material Plan Detail Search page (PL_MAT_DETAIL_SRCH) to define item attribute selection criteria to generate an item list or identify a specific item to review the plan details.

Navigation

Supply Planning > Solve Plan > Material > Material Plan Detail

Display Options

Start Date and End Date

Specify the specific range of dates for an item. The system returns only the demand and supply within the specified range.

The start date default is the current date. The end date default is the planning instance end date.

You can specify different start and end date combinations to review the material detail information for any given time period.

Include Closed/Canceled Orders	Include orders that have been canceled or closed. Use this option to display closed or canceled orders in the time-phased list. Closed and canceled orders do not impact the inventory position, as the system includes these quantities as either supply or demand.
Include Planned Orders	Include planned orders to review a projected time-phased view of the item, based on existing orders and quantity on hand only. The default value for this field includes planned orders.

Item List

If the search criteria that you specify on this page returns multiple possible items, the system generates a list in this group box. Click any value in the Item ID column to access the Material Plan Detail page and review the material plan detail information. Enter a specific planning instance, business unit, and item on the Material Plan Detail search page to access the Material Plan Detail page directly.

Material Plan Detail Page

Use the Material Plan Detail page (PL_MAT_DETAIL) to review a time-phased view of the supply and demand for an item within a planning instance.

Navigation

- Click any link in the Item ID column on the Material Plan Detail Search page. If you specify a business unit and item on the Material Plan Detail Search page, the Material Plan Detail page appears automatically.
- Supply Planning > Solve Plan > Material > Review Material Plan Detail

Note: Use the Review Material Plan Detail component to inquire about, but not modify, the time-phased material plan for an item. The Review Material Plan Detail pages are identical to the Material Plan Detail page. However, the Review Material Plan Details pages are read-only; to add extra demand or planned orders into the planning instance, or to make updates to orders in the plan when drilling down to the order details page, use the Material Plan Detail page.

Item Details

Planning Instance	Not available for entry on this page. Specify a planning instance on the Material Plan Detail Search page.
Business Unit	Select a business unit associated with the planning instance. If you change the business unit, click the Refresh button to re-display the material plan details.
Item ID	Select an item ID associated with the planning instance. If you change the item ID, click the Refresh button to re-display the material plan details.
Configuration Code	A non-active field that is related to a deprecated product.

Inventory Quantity On Hand	Represents the on-hand quantity of the item on the start date of the planning instance.
Safety Stock	If the system selects this field, safety stock definitions exist for the item.
Review Item	Click to access the Refine Plan - Items component, where you can review stocking periods, item attributes, forecast, quantity on hand breakdown, and modify setup parameters to resolve planning constraints.
Display Options	
Start Date and End Date	Specify the specific range of dates for an item.
Include Closed/Canceled Orders	Include canceled or closed orders in the order details list.
Include Planned Orders	Exclude planned orders to review a projected time-phased view of the item, based on existing orders and quantity on hand only. The default value for this field includes planned orders.
Refresh	Click to refresh the current order details list based on any changes that you make in the item details section or in the display options sections of this page.
Next In List	Click to refresh the details in the Order Detail grid with the next item in the item list. The item list—the list of items that meet the specified criteria—appears in the Item List group box on the Material Plan Detail Search page and is sorted by item, inventory business unit.
Previous In List	Click to refresh the details in the Order Detail grid with the previous item in the item list. The item list—the list of items that meet the specified criteria—appears in the Item List group box on the Material Plan Detail Search page and is sorted by item, inventory business unit.
Add Extra Demand	Click to access the Refine Plan - Extra Demand page, where you can create simulated customer orders for point demands that are not forecasted (simulations may include new product introduction or extra usage demands for which you may have an unexpected lack of supply) and planning instance demands on inventory from other sources, such as spare parts planning, quality assurance demands, and shrinkage.
Add Production	Click to access the Refine Plan - Planned Production: Production page, where you can create a new production order for the associated item.
Add Purchase	Click to access the Refine Plan - Planned Purchase Orders page, where you can add a purchase order for the associated item.

Add Transfer

Click to access the Refine Plan - Planned Transfer page, where you can create new transfer orders for the associated item.

Order Details - Quantities Tab**Planning Due Date/Time**

The date and time when the demand needs to be fulfilled or when the supply is to be in inventory based upon the current schedule within the planning instance. For the Starting Balance row, define this value in the Start Date field in the Display Options group box.

Order Type

Provides a short description of the type of transaction that impacts the balance for the item. The order type of *Starting Balance* represents the netted value of quantity on hand against any demands or supplies that exist prior to the specified start date for the corresponding material plan detail.

Order

Displays the order number. For example, depending on the order type, this field might display a sales order number, contract ID, buying agreement number, or the sequence number for a new planned order or extra demand.

Click any value in this column to access the corresponding Refine Plan Details page for the order type. For example, suppose that the order type is *Material Stock Request*, you can click the order ID value to access the Refine Plan - Stock Requests page, where you can maintain information about internal and external demand orders on an inventory business unit, such as planning parameters, dates, and quantities. The system updates the material plan detail with the changes that you make on the Refine Plan Details pages when you return to the order list.

Line

Designates the corresponding line, schedule, demand line, and distribution line for the order. For production and planned production component requirement transactions, the line number field contains the operation sequence from the order where the material is used.

Show Demand (button)

Click to access the Show Demand page, where you can review a time-phased pegging of the transaction to higher-level demands filled by a supply.

Show Supply (button)

Click to access the Show Supply page, where you can review a time-phased pegging of the transaction to lower-level supplies required to fulfill a demand.

Demand Quantity

Displays the outstanding demand for the order. In the Starting On Balance row, the system displays the outstanding demand prior to the start date.

Supply Quantity	Displays the outstanding supply for the order. In the Starting Balance row, the system displays the outstanding supply prior to the start date, plus the quantity on hand.
Balance	Displays the inventory position based on the supply and demand quantities on the corresponding row.

Order Details - Reference Tab

Order Status	<p>Displays the status of the corresponding order.</p> <ul style="list-style-type: none"> For production IDs or production schedules supply order status values include: <i>Planned</i>, <i>Entered</i>, <i>Firmed</i>, <i>Released</i>, and <i>In Process</i>. For purchase orders and transfer orders, values include: <i>Planned</i> and <i>Open</i>. For forecasts, demand order status values include: <i>Open</i>. For production IDs or production schedules, values include: <i>Planned</i>, <i>Entered</i>, <i>Firmed</i>, <i>Released</i>, and <i>In Process</i>. For sales orders, material stock requests, and buying agreements, values include: <i>Open</i>. For transfer orders, values include: <i>Planned</i>, <i>Open</i>, <i>Picked</i>, <i>In Transit</i>, and <i>Received</i>.
Reference	Displays additional information about the corresponding order type. For customer orders—sales orders, buying agreements, and quotes—the reference displays the ship-to customer name. For transfers, the reference displays the source business unit for transfers providing supply, and the destination business unit for transfers placing demand on the corresponding business unit and item combination. For production orders, the reference displays the assembly item for the production transaction. For purchases, the reference displays the supplier name and supplier location.
Frozen	The system populates this field when the order or operation is frozen, indicating that the system cannot move the order automatically.
Priority Rank	<p>Identifies the priority assigned to the top-level independent demand, determined by the demand priority rules. Define priority rules on the Demand Priority Rules page.</p> <p>See Setting Up Demand Priority Rules.</p>

Order Details - Dates/Times Tab

Planning Start Date/Time	Designates the current planned production start, the purchase release, transfer ship date, and time for PeopleSoft Supply orders.
Original Due Date/Time	Displays the due date and time from the transaction system prior to any reschedules.

Original Start Date/Time

Displays the start date and time from the transaction system prior to any reschedules.

Using the Buyer Workbench

The Buyer Workbench enables you to view purchases for a supplier and adjust orders to meet supplier commitments and constraints. This topic provides an overview of the Buyer Workbench, and discusses how to use the Buyer Workbench.

Pages Used to Maintain the Material Plan for a Supplier

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Buyer Workbench Search Page</u>	PL_BWBENCH_SRCH	Define search criteria for generating a list of schedule groups and items. You can select the schedule group, group of items, or item for which you want to review buyer plans.
<u>Buyer Workbench Summary Page</u>	PL_WBENCH_SUMMARY	Analyze the buyer plan for a schedule group, item, or group of items, maintain supply and demand, create new supply, and view capacity and flex for a supplier.
Buyer Workbench Drill Down Detail Page	PL_WB_MAT_DRILLDOWN	Review all of the transactions for the corresponding bucket and row type. From this detail page, you can drill into the Refine Plan pages for each order to make specific changes to an order. <u>Buyer Workbench Summary Page</u>

Understanding the Buyer Workbench

The PeopleSoft Supply Planning Buyer Workbench enables you to review a material plan from a purchase requirements perspective. The Buyer Workbench includes the fundamental features of the Material Plan Workbench, such as charting, supply and demand detail display, and use of dynamic templates. However, while the Material Workbench is item-based, the Buyer Workbench enables you to view data by schedule group (a single supplier location with multiple items) or by item and supplier combinations.

On the Buyer Workbench, you can view different types of items that you procure from suppliers:

- Purchase items that you procure using PeopleSoft Purchasing.
- Spot buy items that you procure using PeopleSoft Strategic Sourcing.

Buyer Workbench Search

On the Buyer Workbench Search page, you can define filter criteria, select the item and supplier combination or schedule group with which you want to work. Click the Search button to generate a list

of items meeting the search criteria. The system sorts the results in the item list grid by schedule group, inventory business unit, item ID, supplier, and supplier location.

To navigate to the Buyer Workbench Summary page, where you can review the plan details, you can select the check box for multiple items to generate an aggregate summary for all of the items by unit of measure or supplier ID, or click any link in the Schedule Group or Item ID column to review the corresponding combination details.

The Buyer Workbench Search page includes five categories of selection criteria:

- General, high-level criteria, which includes planning instance ID, template ID, and business unit.
- Item-specific criteria, which includes item attributes such as item ID, item family, utilization type, planner code, category, item group, planned by, and primary buyer.
- Procurement-specific criteria, which includes supplier SetID, supplier ID, supplier name, supplier location, schedule group, purchase items, spot buy items, and schedule items.
- Violation criteria, which includes capacity and flex violations.
- Workbench display criteria, which includes start date, beginning start date option, period duration, number of periods, and decimal precision.

Buyer Workbench Summary

If you select the Material template, the Buyer Workbench Summary provides you with a horizontal aggregate (bucketed) view of the supply and demand.

If you select the Supplier template, the Buyer Workbench Summary provides you with a horizontal aggregate (bucketed) view of the previously approved supplier schedule and the current supplier schedule.

From the Buyer Workbench Summary page, you can drill down to detail pages, where you can maintain existing orders and add new orders. Additionally, you can create a chart of existing purchase orders and planned purchase orders. Also, you can compare the current plan against the capacity and flex for a supplier, and view capacity and flex violations.

Buyer Workbench Search Page

Use the Buyer Workbench Search page (PL_BWBENCH_SRCH) to define search criteria for generating a list of schedule groups and items.

You can select the schedule group, group of items, or item for which you want to review buyer plans.

Navigation

- Supply Planning > Solve Plan > Material > Buyer Workbench
- Supply Planning > Solve Plan > Material > Review Buyer Purchases

Image: Buyer Workbench Search page

This example illustrates the fields and controls on the Buyer Workbench Search page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Buyer Workbench Search' page. It is divided into two main sections: 'Search Criteria' and 'Display Options'.

Search Criteria:

- *Planning Instance: USBIKE
- *Template: MASTER
- Business Unit:
- Family:
- Item ID:
- Utilization Type:
- Planner Code:
- Category:
- Item Group:
- Configuration Code:
- Planned By: ☒ Distribution Plan, ☒ Master Plan, ☒ Material Plan
- Primary Buyer:
- Supplier SetID:
- Supplier ID:
- Location:
- Schedule Group:
- ☐ Display Schedule Groups, ☒ Display Item/Suppliers, ☐ Schedule Item
- ☒ Purchase Items, ☐ Spot Buy, ☐ Pre-Load Capacity/Flex data
- ☐ Capacity Violations, ☐ Flex Violations

Buttons: Search, Clear

Display Options:

- Start Date: 01/03/2014
- *Beginning Start Date: Beginning of Period
- Period Duration: Week
- Number of Periods: 15
- Decimal Positions: 0

Note: The Review Buyer Purchases component offers the same search, summary, and drill down capabilities as the Buyer Workbench component. However, you cannot make changes or add new orders to the plan through the Review Buyer Purchases component.

Primary Buyer	(Optional) Include in the list only the purchase information for items assigned to the specific primary buyer.
Supplier SetID	(Optional) Include in the list only the purchase information for suppliers whose SetID matches a specific value.
Supplier ID	(Optional) Include in the list only the purchase information for suppliers whose supplier ID matches a specific value.
Name	(Optional) Include in the list only the purchase information for suppliers whose supplier name matches a specific value.
Location	(Optional) Include in the list only the purchase information for suppliers whose supplier location matches a specific value.
Display Schedule Groups	Select to include schedule groups in the list.
Display Items/Suppliers	Select to include item and supplier combinations in the list.
Purchase Items	Select to include items that you procure using PeopleSoft Purchasing.

Spot Buy

Select to include spot buy items that you procure using PeopleSoft Strategic Sourcing.

Schedule Item

Select to include schedule items that you procure .

Schedule Priority

Select a priority if you want to include schedule items with a specific priority. Values are *High*, *Medium*, and *Low*.

The schedule priority will only be enabled if you select the schedule item display option.

Capacity Violations

Select to include schedule groups and items with capacity violations.

Flex Violations

Select to include schedule groups and items with flex violations.

Pre-load Capacity/Flex data

Select to load capacity and flex data in the Buyer Workbench Summary page. If you select this check box, you do not need to click the Calculate Capacity/Flex box on the Buyer Workbench Summary page to view the capacity and flex data.

Buyer Workbench Summary Page

Use the Buyer Workbench Summary page

Navigation

(click any link in the Schedule Group or Item ID column to review the corresponding details).

Image: Buyer Workbench Summary page

This example illustrates the fields and controls on the Buyer Workbench Summary page. You can find definitions for the fields and controls later on this page.

The screenshot shows the Buyer Workbench Summary page. At the top, there are tabs for 'Buyer Workbench Search' and 'Buyer Workbench Summary'. Below the tabs is a 'Display Options' section with a 'Refresh' button. The main section is titled 'Plan Summary' and includes search filters for Business Unit (US008), Item ID (GR8015), Unit Cost (12.4700), Threadless Headset, Standard UOM (EA), Supplier ID (SCM0000001), BIKE SHOP, and Location (MAIN). There is a 'Calculate Capacity/Flex' button. Below the filters is a 'Chart for:' section. The bottom section is titled 'Item Summary' and contains a table with columns for Row Type, Past Due, and various dates (01/19/2014, 01/26/2014, 02/02/2014, 02/09/2014, 02/16/2014, 02/23/2014). The table data is as follows:

Row Type	Past Due	01/19/2014	01/26/2014	02/02/2014	02/09/2014	02/16/2014	02/23/2014
Starting On Hand	0	0	0	600	100	900	150
Vendor Scheduled Purchases	0	0	600	0	800	0	0
Vendor Planned Purchases	0	0	0	0	0	0	850
Other Supply	0	0	0	0	0	0	0
Total Demand	0	0	0	500	0	750	0
Planned On Hand	0	0	600	100	900	150	1,000

The Plan Summary group section contains a set of data for each row selected from the item/supplier grid on the Buyer Workbench Search page, and contains these grid areas:

- Display Options.
- Plan Summary.
- Chart For.
- Item Summary.

Display Options

The fields that you defined on the Buyer Workbench Search page in the Display Options group box appear. You can change this criteria here and click the refresh button to update the data on the Buyer Workbench Summary page.

Plan Summary

This section displays the business unit, item ID, schedule group, supplier ID, and supplier location. If you selected a schedule group on the Buyer Workbench Search page, the system displays the Calculate Capacity/Flex button in this section.

Chart For

In this area, you can review a chart of the plan summary data. The default chart type, as well as the rows included in the chart are determined by the display template that you select.

Note: The system does not automatically generate charts when first accessing the Chart section. Select a graph type and click the Graph button to generate a graph.

Item Summary

This section displays bucketed purchasing information for the schedule group, or items and suppliers that you selected on the Buyer Workbench Search page.

The number of buckets that appear is determined by the values that you define for the fields in the Display Options group box. The template that you select for the corresponding planning instance determines which order-based and calculated rows appear. Order-based rows, such as supplier planned purchases, represent summarized demand and supply types. Calculated row types, such as planned on-hand, are derived from the values in other row types.

Click any link within a bucket (including order-based row types) to access a detailed list of orders.

Note: When calculating values for row types, the system ignores demand and supply where the Include Quantity Flag value is not *Y*. Additionally, the system does not include canceled or closed orders in the summary bucket calculation.

Buyer Workbench Summary Page

Use the Buyer Workbench Summary page.

Click the Calculate Capacity/Flex button to calculate the capacity for this schedule. As changes are made to the item details, the capacity/flex information is NOT automatically updated. Click this button to save any pending detail changes and recalculate the capacity and flex information.

The grid displays all date ranges defined for supplier capacity for the schedule group or item.

Maximum Quantity	The supplier capacity for the period.
Purchase Order Quantity	This column includes the PO schedule quantities for open and closed POs, and planned orders for the date range of the capacity bucket. If this quantity exceeds the Maximum Quantity, the system displays a red square.
Exceed Date	If there is a capacity violation, you can click the Calculate Date button to generate the exact date when the quantity exceeded the defined capacity quantity.

Buyer Workbench Summary Page

Use the Buyer Workbench Summary page (PL_WBENCH_SUMMARY) to analyze the buyer plan for a schedule group, item, or group of items, maintain supply and demand, create new supply, and view capacity and flex for a supplier.

Navigation

Select the check box for a group, an item or multiple items on the Buyer Workbench Search page and click the Generate Summary button to generate an aggregate summary for all of the items with the same unit of measure or supplier ID, or click any link in the Schedule Group or Item ID column to review the corresponding details.

The Flex collapsible section displays both Fixed and Firm periods. The header information displays the period type (*Fixed* or *Firmed*), the date range for the period specific to this schedule, whether tolerance is by *Day* or *Range*, and the upside or downside percentages defined for this item or group.

The contents of the each grid displays any days or ranges which are in flex violation where the *actual* required quantity for the schedule exceeds the baseline quantities set from the prior schedule.

Flex Details Tab

Select the Flex Details tab.

Due Date	If the period is defined as <i>by day</i> , then each day within the range is displayed in the grid separately.
<hr/>	
Note: Only the days where there are quantities defined are displayed; days with a zero quantity are not displayed.	
<hr/>	
Start Date or End Date	If the period is defined as <i>by range</i> , then there will be one row in the grid with the entire range together.
Baseline Quantity	The quantity for the given day or range that was approved for the prior schedule.

Actual Quantity

The current actual quantity (planned orders and POs) for the given day or range. If this quantity exceeds the Baseline Quantity, the system displays a red square.

Over/Under Flex Quantity

This column displays the difference between the actual quantities and the baseline quantity \pm Flex upside or downside quantity.

This value will be highlighted if the flex has been exceeded for a fixed or firmed range. This value indicates how far over or under the acceptable flex quantity the buyer is for that specific date. This value is 0 if the buyer is within the flex tolerance quantity. When violating flex on the downside, this value will be negative. This value is useful to indicate the quantity that needs to be adjusted to meet flex requirements.

Maximum Upside Quantity

This quantity is the *total* acceptable upside quantity for the day or fixed or firmed range (based on setup options). This quantity is calculated based on the baseline value + the percent upside \times the baseline value. This value is displayed independent of a violation and is useful to see the total maximum quantity that can be ordered.

Minimum Downside Quantity

This quantity is the *total* acceptable downside quantity for the day or fixed or firmed range (based on setup options).

This quantity is calculated based on the baseline value – the percent downside \times the baseline value. This value is displayed independent of a violation and is useful to see the total minimum quantity that should be ordered.

More Calculations Tab

Select the More Calculations tab.

Upside (Delta) Quantity

This column displays the *delta* acceptable upside quantity for the day or fixed or firmed range (based on setup options). This quantity is calculated based on the maximum quantities – actual quantities. This quantity is useful to determine if additional quantities can be ordered.

Downside (Delta) Quantity

This column displays the *delta* acceptable downside quantity for the day or fixed or firmed range (based on setup options).

This quantity is calculated based on the actual quantities – minimum quantity. This quantity is useful to determine if fewer quantities can be ordered

Over/Under Baseline % (over/under baseline percentage)

This column displays the current over or under percentage based on actual versus baseline. For example, if the baseline quantity is 100, and actual quantity is 105, then the percentage is 5. This percentage is useful for the buyer to see how much flex is being utilized based on actuals.

When the actual quantities are equal to the baseline quantities, this value is zero.

Showing Supply and Demand

This topic provides an overview of supply and demand display relationships, and discusses how to review supply and demand for an order.

Page Used to Show Supply and Demand

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Show Supply or Show Demand Page	SPL_SHOW_SUPPLY	On the Show Demand page, view a list of orders that are to use the items supplied from the selected order. On the Show Supply page, view a list of orders, the outputs of which are to be used to satisfy the demands of the selected order.

Understanding Supply and Demand Relationships

Visibility to the relationship between supply and demand enables you to determine which supplies are impacted by a demand change and which demands are impacted by a supply change. Additionally, this information provides visibility into the overall production process, enabling you to determine the raw materials used for the finished product, even when multiple production orders are interspersed between procurement and final assembly.

When showing supply or showing demand, PeopleSoft Supply Planning dynamically creates supply and demand relationship information using a first in, first out (FIFO) netting approach.

Note: Show Supply and Show Demand inquiry pages are not intended to be used to predict how a solver creates a planning solution. PeopleSoft Supply Planning solvers do not view supply and demand through pegged relationships.

Note: The Show Supply and Show Demand buttons are available whenever you review a specific order on a page within PeopleSoft Supply Planning. The Show Demand button appears for sales orders, quotes, buying agreements, forecasts, and extra demand. The Show Demand button appears for purchase orders. Both buttons appear for production and transfers.

Show Supply and Show Demand Inquiry Views

PeopleSoft Supply Planning displays supply and demand relationships using single level and indented, multilevel views. On Show Supply inquiries, single level views display only those orders that directly supply the current order. On Show Demand inquiries, single level views display only those orders that are directly supplied by the current order.

On Show Supply inquiries, indented multilevel views display all of the orders that supply materials to the current order. On Show Demand inquiries, indented multilevel views display all of the orders that are supplied directly or indirectly by the current order.

Note: Show Supply and Show Demand inquiry pages do not include safety stock demands. PeopleSoft Supply Planning assumes that a future independent demand is to be linked to this supply.

Show Supply and Show Demand Inquiry Sort Order

The primary sort field for all of the supply and demand transactions for an item is the transaction date. Additionally, PeopleSoft Supply Planning uses secondary sorts. The sort order is:

1. Transaction date and time (earliest to latest).
2. Priority (highest to lowest).
3. Quantity (smallest to largest).
4. A combination of order type and order number or planned sequence number.

Note: PeopleSoft Supply Planning assumes that the quantity on hand for an item is available at the start of time. Consequently, quantity on hand is considered the first supply transaction.

Show Supply or Show Demand Page

Use the Show Supply, Show Demand page (SPL_SHOW_SUPPLY) to on the Show Demand page, view a list of orders that are to use the items supplied from the selected order.

On the Show Supply page, view a list of orders, the outputs of which are to be used to satisfy the demands of the selected order.

Navigation

Click the Show Supply or the Show Demand button on any page within PeopleSoft Supply Planning where you can review a specific order.

Note: Information that appears on the page header refers to the order used as the starting point, which is referenced in the Order field at the top of the page.

Remaining Supply	Displays the outstanding remaining supply for the order.
Remaining Demand	Displays the outstanding remaining demand for the order.
Planning Due Date/Time	Displays the date and time that the demand needs to be fulfilled or the date and time that the supply is expected to be in inventory.
Ignore Safety Stock	The setting determines whether Safety Stock should be recognized as a Demand. The Default setting comes from the Safety Stock Option setting for the Planning Instance. However, you can override this setting and refresh the page to get the revised results.
Return To	Click to return to the page from which you accessed the Show Supply or Show Demand page.

Single Level

Click this button to view only those orders that directly supply the current order or that are directly supplied by the current order.

Indented Multi-Level

Click to display all of the orders that contribute to material supply for the current order or all of the orders that are supplied directly or indirectly by the current order. The indented view is a depth-first view based on the bill of material and transfer structures that displays the time-phased netted supply or demand information between related orders where the supply of one item is used to satisfy the demand requirement of another order. Production and transfer orders create this linkage.

The system considers the current order to be at level 0. Levels increase for each step the order is removed from the current order.

When using the indented multilevel view, click the Expand All button to expand the entire view, or click the Collapse All button to collapse the entire view.

Top Level Only

When showing demand, click to display top level demand only, which includes forecasts, sales orders, buying agreements, quotes, extra demand, material stock requests, and item transfers to business units outside of the current planning instance.

Bottom Level Only

When showing supply, click to display bottom level supply only, which consolidates identical supply tasks into one supply task.

Supply/ Demand Type Safety Stock Displays the description of the order.

Order Details

Displays the show supply and show demand results below the page header. A short description containing the Order type, item ID, order number, and quantity appears to the supply chain. You can click the short description to display more information about the selected order.

Order Type

Displays the order type, if returned as Safety Stock.

Business Unit

Represents the business unit where the demand or supply occurs.

Item ID

On the Show Supply page, this code represents the item that is the output of this supply and required by the order on the previous level.

On the Show Demand page, this code represents the primary output item for production orders. For non-production orders, this code represents the demand item, which matches an item supplied by the previous order.

Required Quantity

Displays the total required quantity for this item, created by the order at the previous level.

Allocated to this Demand	Displays the allocated quantity from the supply that is to be used to satisfy the demand quantity. This field appears only when using show demand.
Demand Quantity	Displays the total demand quantity for the item. This field appears only when using show demand.
Demand Date/Time	Displays the date at which the required quantity is needed. This field appears only when using show demand.
Quantity From This Supply	Displays the allocated quantity from this supply that is to be used to satisfy the demand represented by the required quantity. This field appears only when using show supply.
Supply Quantity	Displays the total supply quantity for the item. This field appears only when using show supply.
Supply Date/Time	Displays the date at which the supply is available. This field appears only when using show supply.

Creating Planning Reports

This topic provides an overview of the Material Plan Planning report (PLS2001) and discusses how to generate planning reports.

Page Used to Create Planning Reports

Page Name	Definition Name	Usage
<u>Planning Report Page</u>	PL_PLANNING_REPORT	Define Planning report print options and filter criteria and generate a Planning report.

Understanding Planning Reports

The Planning report includes four sections: the report header, item attributes, summary, and details. The report header contains standard report information, such as the report number, report name, description, page number, and report run date and time. This information appears on every page of the report. The item attribute information appears at the top of the page and contains various attributes for the item, such as planner, buyer, default sourcing option, quantity on hand, standard cost, and order modifier data. Item attribute information is printed only once for each item.

The summary section includes summary rows and bucketing information, which are based on the display template and bucketing parameters that you define on the Planning Report page. The report displays details below the summary section, including the running balance and impact of each demand and supply order that exists for the item over the corresponding period duration.

The Planning report enables you to include as much or as little of this information as you need to make planning and forecasting decisions. Use the Planning report to:

- Control the layout and data included on the report.
- Generate supply and demand detail to review the individual order information that represents bucket totals, for easier bucket reconciliation.

Creating Planning Report Layouts

PeopleSoft Supply Planning enables you to create business specific Planning report layout and content. You can:

- Display up to 17 periods across a page, including those periods that are past due.

If there are more than 17 periods, the system prints the next 17 periods below the first 17 periods, if there is sufficient vertical space. Otherwise, the system prints the next 17 periods print on the following page.

- Define the bucket size to use for reporting.

You can use days, weeks, months, or a combination of all three. Including the past due and total columns, you can view up to a maximum of 54 columns. Daily buckets always occur before weeks in the planning horizon and weeks occur before months. Weekly buckets run Sunday through Saturday and monthly buckets are by calendar month. PeopleSoft Supply Planning uses the beginning date of the bucket to identify a column.

- Elect to print the Planning report, the Supply and Demand details, or both.
- Define the rows that you want to include in the body of the report by associating the report with a display template.

Note: The number of columns that you can print across a page is dependent on the page size (letter, legal, or A4) and the number of decimals. To print 17 columns, you must use legal paper and print one or fewer decimals. To specify a paper size for this report, change the PAPER_SIZE definition in the PLS2002.SQR source file.

Supply and Demand Detail

PeopleSoft Supply Planning enables you to review supply and demand detail on the Planning report. This row-by-row detail enables you to view the time-phased sequencing of supply and demand for an item and to help reconcile horizontal bucket totals.

This table lists the detail supply sourcing information that PeopleSoft Supply Planning provides with the detailed report. The columns that appear are identical to those that appear on the Material Planning Detail Workbench. If you elect to print Planning report details, these columns appear: Planning Due Date, Planning Start Date, Order Type, Order Number, Line, Status, Demand Quantity, Supply Quantity, Balance, Reference, Original Due Date, Original Start Date, Frozen, and Priority.

Column	Explanation
Due Date	The actual date that the scheduled receipt is expected to be completed or received.

Column	Explanation
Order Number	It identifies the production ID, transfer order ID, purchase order, or planned transfer. In the case of planned orders, it displays the planning sequence number.
Order Quantity	The quantity remaining open on the scheduled receipt.
Order Type	It indicates whether the planning data is identified as a purchase order, production order, or transfer order.
Order Status	For production IDs or production schedules, values are: <i>Planned</i> , <i>Entered</i> , <i>Firmed</i> , <i>Released</i> , and <i>In Process</i> . For purchase orders, values are <i>Planned</i> and <i>Open</i> . For transfer orders, values are <i>Planned</i> , <i>Open</i> , <i>Picked</i> , <i>Received</i> , and <i>In Transit</i> .
Reference	For purchase orders, it displays the supplier ID. For transfer orders, it displays the source business unit.

This table lists the demand sourcing information that PeopleSoft Supply Planning provides with the detailed report:

Column	Explanation
Required Date	The ship date or final assembly start date.
Order Number	It identifies the customer sales order ID, material stock request ID, production ID, production schedule, or transfer order ID. In the case of a forecast, planned production, or planned transfer, this field is the planning sequence number.
Quantity	The quantity open for customer order, buying agreement, transfer order, or production order. In the case of a forecast, this is the forecast quantity.
Type	It indicates whether the planning data is identified as a customer sales order, buying agreement, production order, transfer order, material stock request, or forecast.
Status	The order status of demand. For forecasts, the value is <i>Open</i> . For production IDs or production schedules, values are: <i>Planned</i> , <i>Entered</i> , <i>Firmed</i> , <i>Released</i> , and <i>In Process</i> . For sales orders, MSRs, and buying agreements, values are <i>Open</i> . For transfer orders, values are: <i>Planned</i> , <i>Open</i> , <i>Picked</i> , <i>Received</i> and <i>In Transit</i> .

Column	Explanation
Reference	For forecasts, no value appears. For material stock requests, the customer ID appears, if one exists; otherwise, it displays the customer name, if available. For sales orders, the ship to customer ID appears. For production, the end item ID appears. For transfer orders, the destination business unit appears.

Related Links

[Defining Display Row Types](#)

Planning Report Page

Use the Planning Report page (PL_PLANNING_REPORT) to define Planning report print options and filter criteria and generate a Planning report.

Navigation

Supply Planning > Solve Plan > Reports > Planning Report

Report Print Options

Template

Select a valid item-based display template. The system initially populates this field with a default value that you defined in the Default Display Template field on the User Preferences or Installation Options page for PeopleSoft Supply Planning.

Print Option

Specify the type of information that you want to print on the Planning report. Values are:

- *Horizontal Report Only:* Print all of the bucket information without row detail.
- *Horizontal Report with Detail:* Print all of the bucket information with supply and demand detail.
- *Supply and Demand Detail:* Print only row-by-row information to view the detail.

Daily Buckets, Weekly Buckets, and Monthly Buckets

Define the number of days, weeks, and months that you want to include in the report. The system initially populates this field with the value that you entered in the Default Number of Periods field on the Define Display Template page.

You can combine days, weeks, and months up to a maximum of 52 columns. Daily buckets always occur before weeks in the planning horizon and weeks occur before months. Weekly buckets run Sunday through Saturday. Monthly buckets are by calendar month. Each column date is the beginning date of the bucket. For example, suppose that you entered these values in these fields:

- Daily Buckets: 10
- Weekly Buckets: 12
- Monthly Buckets: 5

In this example, the system generates a report with the first 10 buckets as days, the next 12 as weeks, and the last 5 as months.

If you do not specify reporting buckets, only past due information prints.

Decimal Positions

Define the decimal precision that you want to include in quantity buckets.

Start Date Option and Offset/Date

Select a specific start date for the report or select an offset from the current date. If you select a specific date, enter the date in the adjacent field. If you select an offset, enter in the adjacent field, the number of offset days from the current date.

Include Closed/Cancel Orders

Select to include completed and canceled orders in the report. The system does not include these orders in the report totals.

Projected Inventory Turns

Select to include calculated projected inventory turns on the report. The projected inventory turns appears only when printing the Horizontal report.

Project inventory turns represent the number of times per year that the inventory turns, based on quantity: $[(\text{Total Demand} / \text{Weighted Average Planned On Hand}) \times (365 / \text{total days in planning horizon})]$

This value is quantity-based (rather than dollar-based).

Skip if No Detail

Select to eliminate reporting of items that do not have detailed information, including quantity on hand for the entire planning horizon. For example, suppose that an item in the planning instance did not have quantity on hand or any associated transactions, the Planning Report excludes the item from the report printout.

Do not select this option to print a page for each item, regardless of the details in the plan.

Report Filter Criteria

Define the report filter criteria to generate a Planning report for a limited number of items.

Source Code

Include only those items associated with the specified source code. Values are:

- *Make and Buy*: Include items that you manufacture and purchase.
- *Make*: Include only items that you manufacture.

- *Buy*: Include only items that you purchase.

Sort Sequence

Define the order that filter criteria appears on the Planning report when multiple items appear on the report. Lower numbers have higher sorting priority.

Subtotal

Select to display subtotals for item criteria. To print subtotals on the report, specify a sort sequence for that criterion.

Related Links

[Defining Display Templates](#)

Chapter 7

Managing Capacity Plans

Using the Capacity Workbench

You use capacity plans to manage resources and determine the amount of capacity that is required to produce products in the future. With the capacity plan, you can view capacity by user-specified buckets and navigate to production details where you can add, delete, or cancel production, reschedule tasks, and change quantities.

This topic provides an overview of the Capacity Workbench and capacity calculations and discusses how to use the Capacity Workbench.

Pages Used for the Capacity Workbench

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Capacity Workbench Search Page</u>	PL_CWBENCH_SRCH	Define Capacity Workbench search criteria.
<u>Capacity Workbench Summary Page</u>	PL_WBENCH_SUMMARY	Maintain capacity plans by analyzing the capacity usage for a resource or group of resources.
<u>Capacity Plan Workbench - Display Row Types Page</u>	PL_WB_ROWTYPE_SEC	Modify the workbench row types that appear and the order in which they appear. Changes that you make to row type preferences on this page override those preferences that are defined on the Define Display Template page. However, the system does not save these changes to the Define Display Template page. Modifications that you make on this page are temporary; the system deletes these changes when you navigate away from the workbench.
<u>Required Capacity Page</u>	PL_WB_CAP_DRILLDWN	Review required capacity. Review the production operations that are placing a load on a resource in a period and create new planned production.

Understanding the Capacity Workbench

Use the Capacity Workbench to view the capacity-plan details based on certain selection and sort criteria. After you have identified the overloaded resources, you can view the loads in a bucketed format over time. You can also make manual adjustments to the capacity plan to resolve capacity problems.

Capacity Workbench Search

Use the Capacity Workbench search functionality to define search criteria and generate a list of resources to review. From this page, you can select one resource, multiple resources, or all of the returned resources and generate a resource summary.

Capacity Workbench Summary

On the Capacity Workbench Summary page, you can review multiple resources and aggregations, and navigate to display summaries for individual resources. To access the Capacity Workbench summary page, you can select any individual resource or a group of resources on the Capacity Workbench Search page. Then click the Generate Summary button.

Note: On the Capacity Workbench Summary page, the system displays only that resource information in a period size that matches an individual resource's bucket size. If you select multiple resources, the system ensures that all of the resources have the same bucket size.

Understanding Capacity Calculations

This section discusses how PeopleSoft Supply Planning calculates available and required capacity.

Available Capacity Calculation and Resource Class by Time

The system calculates available capacity using this equation if you have defined the Resource Class field as *Time*:

Available Capacity = Calendar Work Hours × Capacity Multiplier × Availability Percentage

You can navigate to the Work Centers page to define the capacity Multiplier/Units and Availability Percentage fields.

On the Daily Calendar page, you can review the calendar work hours that are defined for the corresponding calendar code.

Available Capacity Calculation and Resource Class by Unit

The method that the system uses to calculate available capacity when you have defined the Resource Class field as *Unit* depends on how you have defined the bucket for the capacity multiplier. For capacity multipliers that are defined using daily buckets:

Available Capacity = Calendar Work Hour/24 x Capacity Multiplier x Availability Percentage.

For capacity multipliers that are defined using weekly buckets:

Available Capacity = Calendar Work Hour Daily x Number of Days/(24x7) x Capacity Multiplier x Availability Percentage.

Required Capacity Calculation and Resource Class by Time

If you have defined the Resource Class field as *Time*, the system sums the capacity for all of the operations on the Required Capacity page to determine total required capacity for a bucket.

Required Capacity Calculation and Resource Class by Unit

The system calculates required capacity using this equation if you have defined the Resource Class field as *Unit*:

Required Capacity = Total Bucket Task Duration/Total Duration x Remaining Quantity.

Note: When calculating required capacity, the system also considers the allocation strategy that you define for spreading capacity over multiple buckets for the resource. The system uses the allocation strategy that you define to allocate the entire task to the first bucket, the last bucket, or proportionally across all of the buckets.

Capacity Workbench Search Page

Use the Capacity Workbench Search page (PL_CWBENCH_SRCH) to define Capacity Workbench search criteria.

Navigation

- Supply Planning > Solve Plan > Capacity > Capacity Plan Workbench
- Supply Planning > Solve Plan > Capacity > Review Capacity Plan Summary

Note: When you access the Capacity Workbench Search and Capacity Workbench Summary pages from the Review Capacity Plan Summary menu, you can analyze the capacity usage for a resource or group of resources. You cannot, however, add or maintain production when you access these pages from the Review Capacity Plan Summary menu. To make changes to the capacity plan, access the Capacity Workbench Search and Capacity Workbench Summary pages through the Capacity Plan Workbench menu.

Resource Code	Select to limit the search to a specific resource. Define resources on the Define Work Centers - Resource page.
	Note: Use wildcard characters to perform partial searches for resource codes.
Planning Bucket Size	Limit the search to resources that are defined with a specific bucket size.
Template	Select a row type template, which determines which row type values appear on the Capacity Work Bench - Summary page with default display options and charting options.
Display Row Types (button)	Click the Display Row Types button to access the Capacity Plan Workbench - Display Row Types page, where you can modify which row types appear on the Capacity Plan Workbench Summary page, and the order in which they appear. Define the row types that initially appear on the Capacity Workbench Summary page by associating row types with a template on the Define Display Templates page and selecting that template in the Template field on this page (or on the Capacity Workbench Search page).

You can access the Capacity Plan Workbench - Display Row Types page on all of the workbench and review pages where row types are used, including the Material Plan Workbench, Review Material Summary Plan, Buyer Workbench, and Review Buyer Purchases pages.

Resource Class

Values are:

- *Time*: Perform aggregate resource planning based on the amount of time that is available in the time bucket that you select.
- *Unit*: Perform aggregate resource planning based on the number of units the resources can produce in a given time bucket.

Work Center Group

Select to limit the search to resources that are associated with a specific work center group.

See "Creating Work Center Groups" (PeopleSoft FSCM 9.2: Manufacturing).

Ignore Violations

Select to limit the search to resources that solvers ignore when solving for capacity.

On the Define Work Center - Planning Options page, you can select Ignore Violations to report over-capacity resources but not repair them during the optimization process. If you select this check box for a resource, the violations for that resource are not repaired by the solvers. You can select this option for noncritical resources to enable the solvers to ignore these resources and focus on critical resources for capacity repair. You can also select this option to generate what-if scenarios.

Search

Click to display all of the capacity plan items that meet the criteria that you defined in the Search Criteria group box.

Clear

Click to clear all of the field values in the Search Criteria group box.

Display Options

Start Date

Define the exact starting time for the period of time that you want to review in the capacity plan. You can review data from the start of the plan or at different intervals in the plan. If you do not enter a start date, the system uses a default value based on the bucket size. Values are:

- *Daily*: The system uses the current date as the default value.
- *Weekly*: The system uses the Sunday of the current week as a default value. For example, suppose that the current date is Tuesday, the 10th of October; the system populates this field with the value equivalent to Sunday, the 8th of October.

- *Monthly*: The system uses the first day of the month as the default value.

Beginning Start Date

Elect to begin the start date of the first period at the *Beginning of Period* or at the *Start Date Entered* in the Start Date field.

For example, suppose that you entered a start date that occurs midweek and you are processing weekly buckets; select *Beginning of Period* to begin the first period on the previous Sunday; select *Start Date Entered* to begin the first period on the specific date that you entered in the Start Date field.

Number of Periods

Define the number of buckets that appear. The system initially populates this field with the value that you entered for the Default Number of Periods field on the Define Display Template page. The number of periods that you define determines the number of tabs that appear in the summary.

Decimal Positions

Define the decimal precision that you want to include in the quantity buckets.

Summary Options

Select All

Click to select all of the items that appear in the Resource List group box.

Clear All

Click to clear all of the selected resources that appear in the Resource List group box.

Generate Summary

If you have selected multiple items in the Resource List group box on the Capacity Workbench Search page, click this button to access the Capacity Workbench Summary page, where you can view the load of each resource in a bucketed format.

Summarize by Resource Class

Select to display an aggregate summary for all of the resources selected by resource class on the Capacity Workbench Summary page. When you select this option, the system displays an extra row per resource class that represents the summation of all of the selected resources within that class.

Show Detail

Select to display the aggregate summary and supporting detail for all of the resources.

Resource List

Selection check box

Select those items that you want to include for review on the Capacity Workbench Summary page.

Resource Code

Click any value in this column to access the Capacity Workbench Summary page, where you can review and maintain capacity usage for the resource. Define resources on the Define Work Centers - Resource page. .

Allocation Strategy

Displays the method for spreading the time or unit capacity over multiple buckets for the resource. Values are:

- *Start*: The entire task is allocated to the first bucket.
- *Proportion*: The task is spread proportionally across all of the buckets.
- *Finish*: The entire task is allocated to the last bucket.

Capacity Workbench Summary Page

Use the Capacity Workbench Summary page (PL_WBENCH_SUMMARY) to maintain capacity plans by analyzing the capacity usage for a resource or group of resources.

Navigation

- Supply Planning > Solve Plan > Capacity > Capacity Plan Workbench
- Supply Planning > Solve Plan > Capacity > Review Capacity Plan Summary

Display Options

This section displays additional search criteria fields. Click the Refresh button to update the data on the Capacity Workbench Summary page.

Start Date

Define the exact starting time for the period of time that you want to review in the capacity plan. You can review data from the start of the plan or at different intervals in the plan. If you do not enter a start date, the system uses a default value based on the bucket size. Values are:

- *Daily*: The system uses the current date as the default value.
- *Weekly*: The system uses the Sunday of the current week as a default value. For example, suppose that the current date is Tuesday, the 10th of October; the system populates this field with the value equivalent to Sunday, the 8th of October.
- *Monthly*: The system uses the first day of the month.

Planning Bucket Size

Limit the search to resources that are defined with a specific bucket size.

Template

Select a row type template, which determines which row type values appear on the Capacity Work Bench - Summary page.

Beginning Start Date

Select to begin the start date of the first period at the *Beginning of Period* or at the *Start Date Entered* in the Start Date field.

For example, suppose that you entered a start date that occurs midweek and you are processing weekly buckets: select *Beginning of Period* to begin the first period on the previous

Sunday; select *Start Date Entered* to begin the first period on the specific date that you entered in the Start Date field.

Number of Periods

Define the number of buckets that appear. The system initially populates this field with the value that you entered in the Default Number of Periods field on the Define Display Template page. The number of periods that you define determines the number of tabs that appear in the summary.

Decimal Positions

Define the decimal precision that you want to include in the quantity buckets.

Refresh

Click to update the information in the Resource Summary group box when you change any of the values in the filter criteria fields.

Instance Start Date and Instance End Date

Displays the start and end dates for the corresponding planning instance.

Plan Summary

Contains a set of data for each row that is selected in the Resource List group box on the Capacity Workbench Search page.

Resource Code, Resource Class

Displays the resource and class that are detailed in the Resource Summary group box.

Summarize by Resource Class

If on the Capacity Workbench Search page, you elected to display an aggregate summary for all of the resources that are selected by resource class, this field appears and specifies the corresponding resource class that is being aggregated.

Chart For

Override the row types to chart (initially defined on the Define Display Templates page) and define the type of chart that you want to use to depict the graphic.

Note: The system does not automatically generate charts. Select a graph type to display the row type chart data, and click the Graph button to generate a graph.

Resource Summary

Row Type

Represents a type of planning data. The data can be cumulative or calculated on a period-by-period basis. Click any link in the Required Capacity row to make changes to the plan.

Row types that appear in this column are those row types that you elected to include in the workbench (the default row types that are associated with the template that you defined on the Define Display Templates page) in the sort order that you defined.

Date columns

These sequential dates correspond to the period duration that you define for the page. The dates can be at daily, weekly, or monthly intervals.

Note: When calculating values for row types, the system ignores production where you selected Ignore Capacity (IGNORE_CAPACITY). Additionally, the system does not include canceled production in the summary bucket calculation.

Capacity Plan Workbench - Display Row Types Page

Use the Capacity Plan Workbench - Display Row Types page (PL_WB_ROWTYPE_SEC) to modify the workbench row types that appear and the order in which they appear.

Changes that you make to row type preferences on this page override those preferences that are defined on the Define Display Template page. However, the system does not save these changes to the Define Display Template page. Modifications that you make on this page are temporary; the system deletes these changes when you navigate away from the workbench.

Navigation

Click the Display Row Types button on the Capacity Workbench Search page.

Note: You can access the Display Row Types page on all of the workbench and review pages where row types are used, including the Material Plan Workbench, Review Material Summary Plan, Buyer Workbench, and Review Buyer Purchases pages.

Sort Order Number

Define the order in which the row types appear on the workbench.

Display Row Type

Select to include the corresponding row type on the workbench display.

Include in Chart

Select to include the row type in generated graphic representations.

Select All Row Types

Click to select all row types for display on the workbench.

Clear All Row Types

Click to exclude all row types for display on the workbench.

Related Links

[Defining Display Row Types](#)

Required Capacity Page

Use the Required Capacity page (PL_WB_CAP_DRILLDOWN) to review required capacity. Review the production operations that are placing a load on a resource in a period and create new planned production.

Note: On the Required Capacity page, you can review required capacity for production and planned production. The fields that appear in the Production grid area and the Planned Production grid area are identical and are defined only once in this section.

Common Information

Resource Code and Resource Class	Displays the resource and class that are detailed in the Resource Summary group box.
Start Date	Displays the start date that is currently scheduled for the operation.
End Date	Displays the end date that is currently scheduled for the operation.
Available Capacity	Displays the total capacity that is available for utilization.
Required Capacity	Represents the header level capacity requirements for all of the production operations that are included in the planning instance.
Utilization	Displays the ratio between required capacity and available capacity.
Production ID	Click to access the maintenance page for the corresponding production operation in the Supply Planning - Refine Plan menu.
Planning Sequence Number	<p>Represents the numbering scheme that the system uses to synchronize planned orders in the Optimization Framework table with those in the transaction system.</p> <p>Each time that you run the Optimization Table Load process in <i>Regeneration</i> mode, the process initializes the next available planning sequence number to zero. The process resequences all of the planned orders that exist in the transaction system when inserting them into the Optimization Framework table. After inserting all of the orders into the table, the process updates the next available planning sequence number on the problem instance table to equal the last planning sequence number that was used plus one.</p> <p>As new planned orders are inserted within the Optimization Framework table, the system increments the planning sequence number for each new record inserted.</p>
Show Supply (button)	Click the Show Supply button for an order to access the corresponding Show Supply page, where you can view a list of orders, the outputs of which will be used to satisfy the demands of the selected order.
Show Demand (button)	Click the Show Demand button for an order to access the corresponding Show Demand page, where you can view a list of orders that will use the items that are supplied from the selected order.
Operation Sequence	Indicates where in the manufacturing or rework process you need the component. The operation sequence refers to an operation on the assembly item's routing. For manufacturing bills of materials (BOMs), this is the item's production routing.

For rework BOMs, this value is the item's rework routing. The default operation sequence is 0, which is the first operation of the manufacturing or rework process.

Define operation sequence on the item's routing by using the Routing Definition Summary page. If you set the operation sequence for all of the items to 0, the system assumes that all of the items are needed at the beginning of production and must be issued at the start of the first operation.

See "Defining Work Centers" (PeopleSoft FSCM 9.2: Manufacturing).

Usage Details Tab

Select the Usage Details tab.

Usage Start Date/Time

Displays the start time that the system uses to calculate and allocate the remaining capacity requirement for the production task when a portion of the task has been completed. The system calculates a load duration value based on the remaining task quantity, then uses that value with the task end time to establish the load start time.

Usage End Date/Time

Displays the operation end date and time plus any additional post production time that is required.

Required Capacity

Represents the capacity requirements for the corresponding production operation.

Percent Load

Displays the percentage of the required capacity in the period attributed to this production operation.

Status

Displays the status for the corresponding production ID.

Frozen

If selected, indicates that this production order cannot be rescheduled automatically by a planning solver.

Operation Details Tab

Select the Operation Details tab.

Planning Start Date/Time

Displays the current date that PeopleSoft Supply Planning intends to begin the operation.

Planning End Date/Time

Displays the current date that PeopleSoft Supply Planning intends to finish the operation.

Item ID

Displays the item that is produced by the corresponding production operation.

Configuration Code

Configuration Code

A non-active field that is related to a deprecated product.

Creating PeopleSoft Supply Planning Capacity Reports

This topic provides an overview of the Capacity report and XML Publisher setup.

Pages Used to Create Capacity Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Definition Page	PSXPRPTDEFN	Define Planning Capacity XML Publisher report templates.
Capacity Report Page	PL_CAPACITY_REPORT	Run Capacity Reports.
Report Detail Page	CDM_INDEX	View XML Publisher Capacity Reports.

Understanding the Capacity Report

You use the Planning Capacity Report (SPL_CAPX_RPT) process to view capacity usage for work center resources for a production period. This helps you determine whether the resource is over or under used and whether it is available for new or future production. By producing the output for multiple business units and resources, you can compare the usage across a location. The Capacity report enables you to produce a capacity usage report using the Process Scheduler or Oracle's XML Publisher. This section describes the Process Scheduler report.

To create the Capacity report, the system accesses the planning engine on the application server. The engine has a model of the planning instance in memory. The planning instance contains all the data that relates to a supply plan for the demand profile. The capacity usage profile is stored in the planning engine along with the supply plan data. You use the Process Scheduler to extract and publish the SPL_CAPX_RPT Application Engine process. This report is also available for use with XML Publisher.

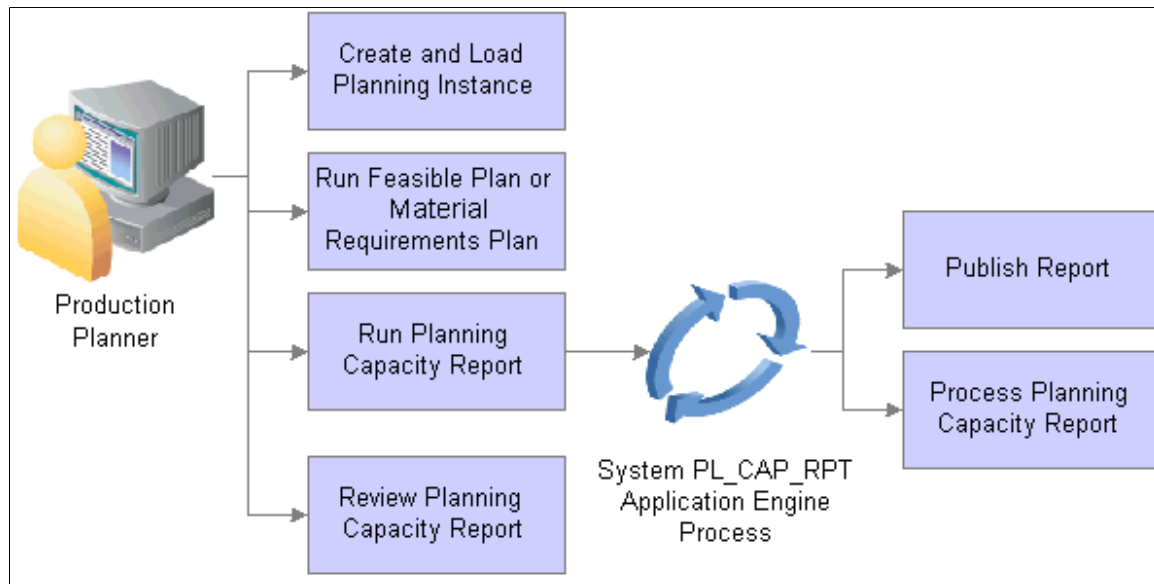
See [Understanding XML Publisher Setup](#).

Note: You can also use the Supply Planning Capacity Workbench to view capacity usage for a business unit, work center, and periods of time. The workbench is interactive and real-time.

The next drawing illustrates how a planner would prepare for and run the Capacity Report. First, planners normally define the planning instance and load it into the system. Next, they run either the material plan to determine material requirements or the Feasible solver to resolve material feasibility for resolvable material violations. Finally, planners run the Capacity Report using the SPL_CAPX_RPT Application Engine process, after which they can review the report using Oracle's XML Publisher. Planners can update the supply or demand and repeat the steps. This drawing illustrates the steps:

Image: Capacity report creation

This drawing illustrates how a planner prepares for and run the Capacity Report



Understanding XML Publisher Setup

You can use Oracle's XML Publisher to access and review Capacity Reports. The advantage of using XML Publisher is that you can generate the report for a large number of resources and business units at anytime, view it later, and share it with others. XML Publisher is a template-based reporting solution that separates business data processing from the report layout and enables you to reuse extracted application data in multiple report layouts. You can customize the report layout without impacting the data logic.

XML Publisher uses a template that uses Microsoft Word as the design format. The template provides a template builder using Microsoft Word or Adobe Acrobat applications to develop a reporting solution. Using a single XML Publisher template, you can publish reports in a variety of formats including PDF, RTF, Excel, and HTML files. XML Publisher is integrated into PeopleTools and does not require separate installation, or extra integration effort. A template for the Capacity Report is delivered with the Supply Planning application.

Integration Broker Setup for the Capacity Report

Along with an XML Publisher report template definition, Supply Planning provides the SPL_OPT_CALL_CAP service operation. A service operation definition consists of general information about an operation and specifies an operation type that determines how the operation is to be processed, synchronously or asynchronously. The SPL_OPT_CALL_CAP service operation is processed synchronously, meaning that the system waits for a response to the message.

In addition, the service operation definition contains routings that determine the direction, inbound or outbound, of the service operation. A service operation has one or more handlers, which contain and run the programming logic for sending or receiving the message and manipulating service operation content. The request and response message for the Capacity Report is SPL_OPT_CALL_CAP.VERSION_1.

Integration Broker settings for sending and receiving Planning Capacity XML Publisher report messages include:

- A service SPL_OPT_CALL that is provided by Supply Planning.
- The SPL_OPT_CALL_CAP service operation provided by Supply Planning and that should be set to an Active status.

To access the service operation, select: Integration Broker > Integration Setup > Services Operations.

- Web service access that provides security for the SPL_OPT_CALL_CAP service operation.

To access the page, select: Integration Broker > Integration Setup > Services Operations. Then, click the Service Operation Security link on the Service Operation - General tab page.

- Ensure that the REQUESTHDLR handler is active for the SPL_OPT_CALL_CAP service operation.
- A routing setting for the SPL_OPT_CALL_CAP_LCL routing is set to Active.

See "Understanding PeopleSoft Integration Broker," Incoming and Outgoing Request Flows, documentation *PeopleTools: PeopleSoft Integration Broker*

Definition Page

Use the Definition page (PSXPRPTDEFN) to define Planning Capacity XML Publisher report templates.

Navigation

Reporting Tools, XML Publisher, Report Definition.

Image: Report Definition page - Definition tab

This example illustrates the fields and controls on the Report Definition page - Definition tab. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Definition' tab of the Report Definition page. At the top, there are tabs for 'Definition', 'Template', 'Output', 'Properties', 'Security', and 'Bursting'. The 'Definition' tab is active.

Report Name: SPL_CAPX_RPT

Data Source (Section Header)

Data Source Type: XML File

Data Source ID: SPL_CAP_RPT_XML

Data Source Description: Capacity Report XML Data Sourc

Report Properties (Section Header)

Report Description: Capacity Report Using XML File

***Report Status:** Active (dropdown)

***Report Category ID:** ALLUSER (dropdown) All PeopleSoft User

Object Owner ID: Supply Planning (dropdown)

***Template Type:** RTF (dropdown)

Retention Days: (text input)

Registered Date/Time: 04/30/2007 1:14:22PM **Registered By:** DVP1

Updated Date/Time: 10/16/2007 10:20:54AM **Updated By:** PPLSOFT

Download: Data Schema Sample Data

Buttons: Add, Update/Display, Include History, Correct History

Navigation: Return to Search, Previous in List, Next in List

Save: (button with floppy disk icon)

You use the page Report Definition page - Definition tab to define the report ID and its attributes. Report definitions associate a data source with template files. The previous page displays the Capacity Planning report definition that is provided with PeopleSoft Supply Planning. You can use the definition as a template to build other report definitions. A template is used to associate different layout formats as required by different countries or regions or as required by different channels such as web posting, printer, facsimile, and so on.

See [Understanding XML Publisher Setup](#).

Template Tab

Select the Template tab.

The Template group box of the Template page refers to a particular template layout, because one report definition can associate multiple template layouts differentiated by language code or channel. Within each template layout is one or more effective-dated versions of the template.

Output Tab

Select the Output tab.

The output destination determines the location and format for the Capacity Report. Destinations include: *Any*, *File*, *Printer*, and *Web*. The default value for the location is *Any*. This enables you to select different locations when running the Process Scheduler.

Security Tab

Select the Security tab.

The Security page captures attributes regarding who can view web-posted output in the Report Manager repository and through the XML Publisher Report Repository Search page. Supply Planning uses the system default values for this page.

Bursting Tab

Select the Bursting tab.

Bursting is an optional advanced feature that is only available when reports are run through Process Scheduler and is not intended for real-time online viewing. It is typically used when you are repeating the generation of a template report layout many times for multiple like sets of data. Supply Planning uses the system default values for this page.

Capacity Report Page

Use the Capacity Report page (PL_CAPACITY_REPORT) to run Capacity Reports.

Navigation

Supply Planning, Solve Plan, Reports, Capacity

Click the **Run** button on the Capacity Report page to create the report.

Image: Capacity Report

This example illustrates the fields and controls on the Capacity Report. You can find definitions for the fields and controls later on this page.

Capacity Report

Run Control ID 1

Report Manager

Process Monitor

Run

Language English

*Planning Instance USBIKE

Start Planning Engine

URLID

Report Print Options

*Template MASTER

*Start Date Option Offset

Offset 0

*Beginning Start Date Beginning of Period

Number of Periods 31

Decimal Positions 2

Summarize by Resource Class

Show Detail Values

Show Production Detail

Report Filter Criteria

Business Unit

Resource Code

Resource Class

Work Center Group

*Planning Bucket Size Weekly

Violation Rule All Resources

>=

Utilization Percentage 0

Save

Return to Search

Previous in List

Next in List

Notify

Add

Update/Display

To define the parameters for a Capacity Report, select the run control ID, complete the print options and filter criteria and click the Run button. When running the program, the system extracts the capacity data and invokes XML Publisher. Using Integration Broker message transactions, the system processes the supply planning transactions and retrieves the capacity profiles from the application engine, processes them, and saves them to database tables where capacity data can be extracted for the report.

- Planning Instances

Identifies a complete set of data that you use to analyze and create a feasible supply plan.
- Start Planning Engine

Click to start the planning engine automatically for the corresponding planning instance. If the planning engine is already running, the system ignores this option and uses the domain on which the planning engine is currently running to run the solver. If you select Start Planning Engine and the planning engine is not currently running, the system starts the planning engine for the corresponding planning instance using the domain that you specify in the URL field. If you specify no domain, or if the planning engine fails to start on the domain that you specify in the URL field, the system uses the default URL that you define on the Planning Engine Domains page
- URL (uniform resource locator)

Specify the location of a planning server where you want to start the planning engine after the Load Planning Instance has finished. If you do not specify a URL here, the system uses the default URL. To obtain a URL, the system uses the domain that you use to run solver if the planning instance is running. If

the planning instance is not running, and you did not specify a domain, or if the planning instance fails to start on the domain that you specify, the system uses the default domain that you define on the Planning Engine Domains page.

Report Print Options

Use this grid to define the print options for the Capacity report.

Template	Select a row type template. The template determines which row type values appear in the Capacity report. PeopleSoft Supply Planning provides standard display templates that you can use to set up of default templates where you can define unique row types, graphs, period durations, and other display defaults for workbenches and review pages. When you create reports for XML Publisher, you can also use a delivered default template.
Start Date Option	Select the date option that you want to use to generate the Capacity report. Options include: <i>Date</i> and <i>Offset</i> . To define a specific date, select <i>Date</i> . If you select a specific date, enter the date in the Date field. If you select the <i>Offset</i> value, enter the number of offset days from the current date in the Offset field.
Date	Select a specific date on which to generate the Capacity report.
Offset	Enter the number of days that you want to offset the report generation date. For example, if you enter an offset of 10, and if the current date is 12/01/2009, the system calculates the start date as 12/01/2009 plus 10 days and sets the offset date as 12/11/2009 for generating the Capacity Report.
Beginning Start Date	Define the start date of the first bucket. Values are <i>Beginning of Period</i> , in which the start date falls on a specific start date that you entered in the Date field. Initially, the system uses <i>Beginning of Period</i> as the default value. Templates with capacity-based display types always use <i>Beginning of Period</i> .
Number of Periods	Enter the number of buckets that the system should calculate and display in the Capacity Report. The system initially populates this field with the value that you entered for the Default Number of Periods field on the Define Display Template page. This value defines how far into the future, that the report displays the capacity usage profile. For example, if you enter 30, the report displays 30 bucketed values for capacity usage for the bucket size specified, such as 30 days, 30 weeks, or 30 months.
Decimal Positions	Enter the decimal precision that the system should uses for Capacity Report quantity buckets.
Summarize by Resource Class	Select to display an aggregate summary on the Planning Resource report for all of the resources defined by the resource class (<i>Time</i> or <i>Unit</i>) selected in the Resource Class field.

The system aggregates them across multiple resource codes; however, not across the business unit.

Only resources that belong to the same resource class, and with the same planning bucket and same business unit can be aggregated. If you do not provide the filter for the resource class, planning bucket size, or business unit, the report will contain multiple summarizations for each combination of resource class, planning bucket size and business unit.

The work center group is used only as filter. The system summarizes the Capacity Report across work center groups.

If you enter a value for the resource code without a wildcard symbol, the summarization section will not be displayed in the report, because there is nothing to summarize.

Show Detail Information

Select to include the aggregate summary and supporting details for all resources in the Capacity Report. You use this check box only with the Summarize by Resource Class check box. If you select both the Summarize by Resource Class and Show Detail Information, check boxes, the report summarizes the resource usage over time, and detail or individual resource usage over time. If the Show Detail Information check box is deselected, then the report only displays the summarized information.

Show Production Detail

Select to include production details in the Capacity Planning report. These details include the resource for the given time frame, either planned or actual.

Report Filter Criteria

Business Unit

Select a single business unit or leave it the field blank to select all business units. You cannot use wildcard searches for this field.

Resource Class

Select a resource class value or leave the field blank to select both resources classes. Values are *Time* that displays aggregate resources based on the amount of time that is available in the time bucket that you select, and *Unit* that displays aggregate resources based on the number of units the resources can produce in a time bucket.

Work Center Group

Select a work center group. Work center groups can consist of one or more people and machines and represents a logical grouping of machines, a department, or a cost center. You can also use wildcard searches for this field.

Planning Bucket Size

Select either *Daily*, *Weekly*, or *Monthly* planning buckets on . A value is required in this field. If you want to see a daily and weekly report, you must, for example generate two reports.

Violation Rule

Select a value to limit the search for resources. Possible values are:

All Resources: Includes all resources in the search.

Consider Violations: Limits the search to resources where solvers consider violations when solving for capacity.

Ignore Violations: Limits the search to resources that solvers ignore when solving for capacity. You use the Work Center page to indicate that you want to report over-capacity resources but not repair them during the optimization process. To access the page, select: Supply Planning > Refine Plan > Manufacturing.

Utilization Percentage

Select an operator by which you want to limit the resource search. After selecting an operator, enter a value to use in conjunction with the operator. This filters the range of the utilization percentage. For example, if you select the > (greater than) field value and enter the an operator value of 90, the Capacity Report will display capacity usage for only those resources with utilization greater than 90 percent. The utilization is the result from the solver that divides the usage by availability. Availability is calculated using the definition defined on the Work Center page.

Report Detail Page

Use the Report Detail page (click the Report Manager link on the Capacity Report page, select the Administration tab, and then select a report).

You can open the report by clicking the report link. To view the report results in another page, click the description of the required report. To view the report results or any associated log or message file, click the Details link. Click the name of the report or message to display the output in another page.

See Viewing Reports, "Using Report Manager," *PeopleTools: PeopleSoft Process Scheduler documentation*

The Capacity report has five sections. The sections that appear in the report depend on the report options selected when the report was created.

Column labels for the Capacity Report are dynamic and depend on the Supply Planning display template. Column values are also dynamic and are based on the row types that has been selected for the display template. Business data is prepared using PeopleCode. XML Publisher processes the number and date formats and checks settings on the header for production, detail, and summary to determine the sections to hide or show.

The report provides these sections:

- The Report Header section displays planning instance details, report print options, and report filter criteria in addition the business unit, resource code, and some associate attributes, such as the aggregate strategy and plan bucket size.
- The Capacity Usage Summary section displays a list of resources that are summarized. The detail section displays one record with bucketed information about the aggregated resource detail. When you run the report, ensure that you select the Summarize by Resource check box to include these details.

- The Capacity Usage Detail section displays the bucketed resource usage over time. The detail displays the start time and end time for each bucket, capacity available, capacity required, capacity unused, capacity utilization percentage, and capacity over-utilization percentage.
- The Capacity Usage Summarized section displays resources with the same resource class and planning bucket along with an aggregate resource report on the resource's availability, requirement and utilization percentage. Select the Show Detail Information Summarize by Resource Class check boxes to include this information in the report.
- The Required Capacity Usage Detail section displays information about the production ID or planned production associated to the resource for a given bucket. Select the Show Production Detail and check box when you generate the report to include required usage details in the Capacity Report.

Chapter 8

Refining PeopleSoft Supply Planning Details

Refining Plan Definition Details

This topic provides an overview of items in PeopleSoft Supply Planning.

Pages Used to Refine Plan Definition Details

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Review Business Units Page</u>	PL_BU	Review all of the inventory business units associated with a planning instance.
<u>Review Business Unit Calendars Page</u>	PL_SHIFT_CAL	Maintain manufacturing, shipping, and receiving calendars. Manufacturing calendars display the times that the business unit or work centers are available for production. Shipping and receiving calendars display times that the business unit is open to ship or receive inventory. For a specific calendar, you can navigate to a specific day to view the valid times for the day on the Daily Calendar page.
<u>Calendars Page</u>	PL_DAILY_CAL	Change, add, and delete manufacturing, receiving, and shipping calendar times. Changing calendar times does not automatically reschedule supply or demand.
<u>Items Page</u>	PL_BU_ITEMS_HDR	Maintain general item information for an item in a planning instance.
<u>Items - Attributes Page</u>	PL_BU_ITEMS_ATTR	Review item attribute information for an item in a planning instance.
<u>Items - Forecast Page</u>	PL_BU_ITEMS_FCST	Maintain item forecast information for an item in a planning instance.
<u>Items - Quantity On Hand Page</u>	PL_BU_ITEMS_QOH	Maintain the quantity on-hand information for an item in a planning instance.
<u>Items - Stocking Periods Page</u>	PL_SAFETY_STK	Maintain the stocking period information for an item in a planning instance.

Understanding Items in PeopleSoft Supply Planning

PeopleSoft Supply Planning obtains all of the item information from the PL_BU_ITEMS table, which contains the combined data from the business unit item and the planning item definitions in the transaction system. PeopleSoft Supply Planning supports inventory items (configured and nonconfigured), planning items, and phantom items. The system includes items in a planning instance when the item is associated with one of the business units in the business unit group; when the item has a planned by option defined as a distribution, master, or material plan; when the item has a source code defined as make, buy, or planning; and when the item has a status defined as active, hold, or discontinue.

Inventory Items

Inventory items include demand and supply transactions and quantities on hand in the planning instance. PeopleSoft Supply Planning obtains attributes for inventory items from the transaction system and stores the attributes with the planning instance on the PL_BU_ITEMS table. You can generate new planned supply for inventory items, as defined by the options that you defined for the item on the sourcing template.

The system obtains the quantity on hand for each inventory item during the Load Planning Instance process (PL_LOAD_OPT). PeopleSoft Supply Planning calculates quantity on hand by summing the quantity available, quantity reserved, staged inventory quantities (interface and staged item quantities), quarantined quantities, and quantities shipped but not depleted.

PeopleSoft Supply Planning generates planned transfers or purchase orders (POs) for configuration-coded items only if these are valid sourcing options for the configurable item. The system assumes that you ran the Submit Production Request process (CP_PRDN_RQST) to generate the configured production supply prior to running the Load Planning Instance process.

Planning Items

Planning items are noninventoried items used to define families for forecasting. Planning items cannot have individual transactions and do not use quantity on hand. PeopleSoft Supply Planning allocates forecasts for planning items to components of the planning items as defined on the planning bill of material (BOM) for the item.

Phantom Items

Phantom items are built but rarely stocked before they are used in the manufacturing process. In PeopleSoft Supply Planning, supply and demand transactions can exist with quantity on hand for phantom items. PeopleSoft Supply Planning explodes a phantom item BOM when the phantom item exists as a component on another BOM. If supply and demand exist directly for the phantom item, PeopleSoft Supply Planning nets the requirements and generates supply for the phantom item as necessary, using the sourcing template options that you defined for the phantom item.

Review Business Units Page

Use the Review Business Units page (PL_BU) to review all of the inventory business units associated with a planning instance.

Navigation

Supply Planning > Refine Plan > Definitions > Review Business Units

Primary	<p>Select to indicate that the associated business unit is defined in the business unit group.</p> <p>The Load Planning Instance process includes business units needed for transfer order relationships that are not specifically defined in the business unit group. The Load Planning Instance process does not load items for non-primary business units into the planning instance.</p>
Reverse Quarantine Quantity	<p>Select to indicate that on-hand quantities are considered part of the quantity on hand.</p>
Always Open for Shipping	<p>Select to indicate that no closure calendars exist for shipping and the business unit can ship on all of the days and at all times. PeopleSoft Supply Planning does not create a corresponding shipping calendar in the planning instance when you select this option.</p>
Available Inventory Balances	<p>Select to indicate that the planning instance includes inventory balances from the transaction system.</p> <p>If this option is not selected, the system sets all of the quantity on-hand values in the planning instance for the item and business unit combination to zero.</p>
Always Open for Receiving	<p>Select to indicate that no closure calendars exist for receiving and that the business unit can receive on all of the days and at all times. When you select this option, PeopleSoft Supply Planning does not create a corresponding receiving calendar in the planning instance.</p>
Manufacturing Business Unit	<p>If selected, indicates that the associated business unit is used for production.</p>
Calendar Code	<p>Displays the manufacturing calendar for the business unit</p>
Round Component Demand	<p>Select to round the component demand when generating planned orders.</p>
BOM Explosion Date	<p>Indicates whether the production components added to an order are based on the production start or end date.</p>
Allow Substitution	<p>Select to indicate that the solvers can fulfill the production component demand of an item with the available supply of a defined substitute.</p>
Create Substitute Supply	<p>Select to indicate that the solvers can create new supply for substitute components to resolve constraints. If you do not select this option, the substitute algorithm can use on-hand quantities only.</p> <p>This option is available only when you select Allow Substitution for the business unit.</p>

Check Substitute First

Select to indicate that the solvers can attempt to use substitute components before using alternate sourcing options. If you do not select this option, the solver checks alternate sourcing options before using substitutes to resolve a constraint failure.

This option is available only when you select Allow Substitution for the business unit.

Review Business Unit Calendars Page

Use the Calendars page (PL_SHIFT_CAL) to maintain manufacturing, shipping, and receiving calendars.

Manufacturing calendars display the times that the business unit or work centers are available for production. Shipping and receiving calendars display times that the business unit is open to ship or receive inventory. For a specific calendar, you can navigate to a specific day to view the valid times for the day on the Daily Calendar page.

Navigation

Supply Planning > Refine Plan > Definitions > Calendars

Always Open for Shipping

Select to indicate that no closure calendars exist for shipping, and the business unit can ship on all of the days and at all times. PeopleSoft Supply Planning does not create a corresponding shipping calendar in the planning instance when you select this option.

Always Open for Receiving

Select to indicate that no closure calendars exist for receiving and that the business unit can receive on all of the days and at all times. When you select this option, PeopleSoft Supply Planning does not create a corresponding receiving calendar in the planning instance.

Calendars Page

Use the Calendars page, which displays the times open or available per day (click the date on any calendar from the Review Business Unit Calendars or the date from the Calendars page to display the daily calendar).

The yellow calendar day indicates the current date. Grey calendar days fall outside of the month that currently appears.

Click the date on any calendar day to access the Daily Calendar page, where you can change, add, and delete calendar times.

Items Page

Use the Items page (PL_BU_ITEMS_HDR) to maintain general item information for an item in a planning instance.

Navigation

Supply Planning > Refine Plan > Definitions > Items

Item Early Fence Date	Enter a value that falls between the planning instance start and end dates. This field is required.
Planned By	Displays the planned-by value defined in the transaction system item definition.
Standard UOM (standard unit of measure)	Displays the standard UOM defined for the item in the transaction system. The system displays all of the quantities in PeopleSoft Supply Planning in the standard UOM for the item.
Fixed Period (days)	Displays the number of days that the system looks ahead for demand when determining the amount of supply covered by an order.
Low Level Code	A number that identifies the lowest level in the supply chain at which a particular item appears. The system does not calculate net requirements for a given item until all of the gross requirements have been calculated down to that level. The system assigns a low level code of -1 to indicate that the low-level code has not been calculated and -999 to indicate the low-level coder could not be calculated. You can calculate low-level codes when running the solvers.
Planning Item Precision	Represents the decimal precision for quantities in the standard UOM.
Reference Routing Item	Displays the item whose production routing the system uses when generating new planned production.
Average Order Quantity	Displays the average order quantity defined in the transaction system, often represented by the batch or lot size used to supply the item.
Inventory Item	Select to indicate that this item is a finished good, a component of a manufactured assembly, a subassembly, buildable inventory, a purchased component, or a raw material.
Phantom Item	Select to indicate that the associated item is a phantom item. The system uses these items to drive demand straight through the phantom to the BOM components, which eventually become inventory items. Phantom items can have quantity on hand and individual transactions for supply and demand.
Phase-Out	Select to indicate that the item is being discontinued. The system displays a discontinue date when you select this option. It plans no further supply for an item beyond this date.
Lot for Lot	Select to indicate that the item has no order modifiers. Solvers attempt pegging and quantity matching between demands and supplies when you select this option.

Configuration Code Generation	A non-active field that is related to a deprecated product.
Rounding Rule	Displays the rounding method that the system applies to calculations not involving yield.

Items - Attributes Page

Use the Items - Attributes page (PL_BU_ITEMS_ATTR) to review item attribute information for an item in a planning instance.

Navigation

Supply Planning > Refine Plan > Definitions > Items

Buyer	Displays the primary buyer for the item. The system uses this default hierarchy when selecting a value: <ul style="list-style-type: none"> Item business unit. Item purchase attribute. Item category. PO loader defaults.
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Items - Forecast Page

Use the Items - Forecast page (PL_BU_ITEMS_FCST) to maintain item forecast information for an item in a planning instance.

Navigation

Supply Planning > Refine Plan > Definitions > Items

Demand Fence Date	<p>A time fence before which the forecast demand for the item is not considered (or consumed) by the planning engine. Any value that you enter must fall between the planning instance start and end dates. This is a required field.</p> <p>Solvers consider only actual orders as demand before this fence.</p>
Forecast Fulfillment Size	Displays the standard quantity used to break large forecast demand into smaller forecast tasks. When the forecast demand of a planning period cannot be met completely, the planning engine determines which smaller forecast tasks can be delayed or canceled, thereby satisfying part of the forecast demand while maintaining plan feasibility. If you do not define this value (or use the default value 0), the system creates a single forecast task for the forecast demand of the item in that planning period.
Forecast Priority Rank	Displays a numeric value ranging from 1 (highest priority) to 999 (lowest priority) used by the planning engine to determine the order in fulfilling various independent demands, which

include forecast demand. The priority 0 is reserved for the system.

Note: You cannot enter the value 0 in the Forecast Priority Rank field.

Forecast Adjustment Action

Displays the adjustment method used by forecast consumption when allocating forecasts from larger periods (typically, forecasts from PeopleSoft Publish Forecast tables) to smaller periods (typically, planning periods used in PeopleSoft Supply Planning). The system uses *No Adjustment* as the default value.

Weight Profile

Displays the PeopleSoft weight profile that the system uses to convert the forecast periods in PeopleSoft Publish Forecast tables into daily intervals for establishing the forecast buckets in PeopleSoft Supply Planning. The Load Planning Instance process will assign a default weight profile if PeopleSoft Publish Forecast tables are not used or a weight profile is not defined for PeopleSoft calendars.

Explode Demand for Consumption

Select to indicate that the system explodes sales order demand or transfer demand through lower levels for the item for forecast consumption.

Aggregate Demand

Select to identify the item as representing a group of items for forecast consumption. For an aggregate demand item, you establish aggregate demand children. The forecast for the aggregate demand children is rolled up to one demand total for the aggregate demand item. Forecast consumption is then performed at the aggregate-item level rather than at the individual-item level. You can identify both planning items and inventory items as aggregate demand items.

Forecast Consumption Method

Identify which demands are included in forecast consumption.

Items - Quantity On Hand Page

Use the Items - Quantity On Hand page (PL_BU_ITEMS_QOH) to maintain the quantity on-hand information for an item in a planning instance.

Navigation

Supply Planning > Refine Plan > Definitions > Items

Base Currency

Displays the currency of the planning instance. Define the base currency of a planning instance on the Load Planning Instance - General page.

Unit Cost

Displays the primary ledger unit cost for an item converted into the base currency of the planning instance.

Quantity on Hand Date/Time	Displays the date and time at which the quantity fields were populated during the Load Planning Instance process.
Quantity Available	<p>The available quantity of the business unit, which represents a subset of the quantity on hand, reflecting the total item quantity that can be used to fulfill demand. If soft reservations processing is in effect for the item, the Quantity Available field contains the total item quantity that can be reserved for orders by the Material Reservations process (INPLDMND), or through the Material Stock Reservations component. If soft reservations processing is not in effect, this field reflects the total item quantity you can include on push picking plans or confirmed as picked by the Picking Confirmation process (INPBCONF).</p> <p>Once quantity is soft reserved for the business unit or allocated from a specific storage location, the quantity available for the business unit is decreased and the quantity reserved is increased.</p>
Quantity Reserved	<p>If soft reservations processing is selected, this field represents the total item quantity reserved or hard allocated for all demand lines within the business unit that have not yet been depleted.</p> <p>If soft reservations is not selected, this field represents the total quantity allocated from specific storage locations for all demand lines in the business unit that have been confirmed but not yet depleted. The Quantity Reserved field value also includes nettable, available work in progress (WIP) quantity, regardless of whether soft reservation processing is in effect.</p>
Staged Interface Quantity	Displays the quantity received, but not staged for putaway in inventory.
Staged Item Quantity	Displays the quantity staged but not putaway.
Quarantine Quantity	Displays the quantities in storage areas that are on hold or restricted. The Load Planning Instance process populates this value only if the you selected the Reverse Quarantine Quantity option for the business unit.
Shipped Not Depleted Quantity	Displays the quantity which has been recorded as shipped but has not been physically depleted from the inventory balance of the item.
Inventory Quantity On Hand	Displays the sum of the quantity available, the quantity reserved, the staged interface quantity, the staged item quantity, and the quarantine quantity, minus the shipped not depleted quantity.
Overridden	Select to indicate that the quantity on hand was manually overridden in the planning instance.
Reset	If you change the inventory quantity on hand, click to reset the quantity on hand to its original value.
Projected Useup Quantity On Hand	Displays the remaining quantity on hand for a phase-out item at the useup date.

Note: This option is only available if the item has an affiliated phase-out attribute.

Items - Stocking Periods Page

Use the Items - Stocking Periods page (PL_SAFETY_STK) to maintain the stocking period information for an item in a planning instance.

Navigation

Supply Planning > Refine Plan > Definitions > Items

Start Date and End Date

Defines the period for which the corresponding safety and excess stock information are established in PeopleSoft Supply Planning.

Safety Limit

Displays the minimum quantity on hand you want to maintain to satisfy unexpected requirements.

Excess Limit

Displays the maximum quantity on hand you want to maintain to satisfy unexpected requirements. Any value that you enter in this field must be greater than the value defined in the Safety Limit field.

Refining and Viewing Sourcing Information Details

This topic discusses how to refine and view sourcing information details.

Pages Used to Refine Sourcing Information Details

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Sourcing Templates Page	PL_SRC_TMPL_INF	Refine the sourcing template, including sourcing priorities and defaults, for an item.
Review Business Unit Transfer Options Page	PL_TRANS_BU_OPT	Review default transfer attributes for ship via methods defined between source and destination business units, including transfer lead times and preferred order quantities. Review Business Unit Transfer Options or the Review Item Transfer Options Page

Page Name	Definition Name	Usage
Review Item Transfer Options Page	PL_TRANS_IT_OPT	Review item-specific transfer attributes for ship via methods defined between source and destination business units, including transfer lead times and preferred order quantities. Review Business Unit Transfer Options or the Review Item Transfer Options Page
Review Production Options Page	PL_PRODUCTION_OPT	Review the production option (combination of BOM and routing), and its associated details, for an item.
Review Purchase Options Page	PL_PURCHASE_OPT	Review the purchase option definition and associated details, such as buyer, supplier SetID, supplier ID, and supplier location, for an item.

Common Elements Used in This Section

Maximum Order Quantity	Displays the maximum quantity when creating new planned supplies.
Minimum Order Quantity	Displays the minimum quantity when creating new planned supplies.
Order Multiple	Displays the incremental quantity when creating new planned supplies.
Planning Instance	Click to access the planning instance information that includes basic information, dates, orders, and forecasts.

Sourcing Templates Page

Use the Review Sourcing Templates page (PL_SRC_TMPL_INF) to refine the sourcing template, including sourcing priorities and defaults, for an item.

Navigation

Supply Planning > Refine Plan > Sourcing Information > Sourcing Templates

Image: Sourcing Templates page

This example illustrates the fields and controls on the Sourcing Templates page. You can find definitions for the fields and controls later on this page.

Sourcing Templates

Planning Instance **TEST PLAN**

Business Unit **US008** Standard UOM **EA**

Item ID **HB7100** Hub Subassembly

Master Sourcing Template

☒ **Manually Maintained**

Sourcing Options [Personalize](#) | [Find](#) | [View All](#) | [First](#) | [1-2 of 2](#) | [Last](#)

Default	Priority	Option Type	Unit Cost	Minimum Quantity	Maximum Quantity
<input type="checkbox"/>	10	Purchase	5.0000		
<input checked="" type="checkbox"/>	20	Production	26.7616		

[Update Production](#) [Update Transfer](#) [Update Purchase](#)

You can use this planning instance page to maintain sourcing templates within a planning instance and to copy changes made to planning instance sourcing templates directly back to the business unit (master) sourcing template. You can reset the Manually Maintained check box at the business unit sourcing template.

You can also replace the sourcing options for this planning instance with the business unit sourcing template options. Click the Refresh Current Template button to replace the existing sourcing options with the business unit sourcing template and if the business unit sourcing template does not exist, the system creates the default sourcing options. When the system prompts you, click Yes to refresh the current template with the current default sourcing options. Click No to keep the sourcing options as they appear on the page.

Note: When you click the Refresh Current Template button, the system copies the business unit (master) sourcing template to the planning instance sourcing template. If the business unit sourcing template doesn't exist, the system creates the default sourcing options.

Viewing or editing this page depends on whether the optimization engine is running. If the engine is running, the page will be display-only. If the planning engine is not running, you can edit the page and copy it to the master sourcing template.

Update

Click to update the master sourcing template using the values from the planning instance template. A master sourcing template is a template that you set up for a business unit and inventory item; whereas, a planning instance sourcing template is one set up for a business unit and inventory item within a planning instance.

When a master sourcing template exists, and you click the Update button, the system replaces the values on the planning instance. If the master template does not exist, the system

creates it using values from this sourcing template. If the Manually Maintained check box is selected, the system updates the master sourcing template with the Manually Maintained check box selected.

Manually Maintained

Select to identify this sourcing template as a manually maintained template. If you select this check box, the Generate Sourcing Template batch job does not overwrite any options in the template.

If you no longer need to maintain this sourcing template manually, deselect this check box. The next time that you run the Generate Sourcing Template batch job, the system overwrites the current sourcing template, including the options that you have defined.

Sourcing

Select the Sourcing tab.

Default

The system uses a default option to source demand when the planning engine cannot select other sourcing options because of capacity or material shortages. The Material solver uses the default option only when generating planned supply. Define at least one sourcing option as the default.

Priority

Displays the sourcing priority and sequence used by the Material and Capacity Feasible solver.

Option Type

Displays whether the demand is supplied by a production order, purchase order, or by a transfer order.

Minimum Quantity

When specified, identifies a minimum individual demand quantity that must be met before considering the related sourcing option. If the demand is greater than or equal to the minimum quantity specified, the system uses the sourcing option to generate the necessary supply. If the demand quantity is less than the minimum, the system does not consider the sourcing option a valid sourcing option.

Maximum Quantity

When specified, identifies a maximum individual demand quantity that is to be considered for the related sourcing option. If the demand quantity is less than or equal to the maximum quantity specified, the system uses the sourcing option to generate the necessary supply. If the demand quantity is greater than the maximum, the system does not consider the sourcing option a valid sourcing option.

Production

Select the Production tab.

BOM (bill of material)	Displays the BOM identifier for the production option in the template. Production options can be predefined or created based on defaults specified at the item attributes by unit level.
Routing	Displays the routing identifier for the production option in the template. This column is empty if you are not using routings.
Associated Primary BOM (associated primary bill of material)	For all of the secondary co-products, displays the primary co-product for which the BOM or routing exists. When an item is a co-product on multiple primary BOMs, then one of the primary co-products must be assigned as an associated primary BOM. The system uses the production option for the associated primary to generate supply for the secondary co-products.

Purchase

Select the Purchase tab.

Supplier SetID	Displays the SetID under which you define the supplier and purchasing information.
Supplier ID	Displays the supplier ID for the purchase option.
Supplier Name	Displays the supplier name for the supplier ID on the purchase option.
Supplier Location	Displays the supplier location used to create the purchase option.
Buyer	Displays the buyer ID associated with the purchase option supplier. Solvers assign this buyer when creating new planned purchases. If this buyer is blank, the solver assigns the primary buyer associated with the item.

Transfer

Select the Transfer tab.

Source BU (source business unit)	Displays the business unit that supplies the item.
Ship Via	Displays the method used for shipping the item.

Review Business Unit Transfer Options or the Review Item Transfer Options Page

Use the Review Business Unit Transfer Options page (PL_TRANS_BU_OPT) to review default transfer attributes for ship via methods defined between source and destination business units, including transfer lead times and preferred order quantities.

Navigation

Supply Planning > Refine Plan > Sourcing Information > Unit Transfer Options

Note: Unit-level transfer options are valid only for items defined with *Distribution* as the planned by value.

Ship Via Code	Displays the method shipping the item.
Intransit Days	Displays the number of days required to transport completed units from one operation to the next.
Intransit Hours	Displays the number of hours required to transport completed units from one operation to the next.
Transfer Yield	Displays the usable output from the transfer. Expressed as a percentage, the transfer yield is used in PeopleSoft Supply Planning to inflate the planned quantity on transfers to account for any loss that occurs during transport.

Review Production Options Page

Use the Review Production Options page (PL_PRODUCTION_OPT) to review the production option (combination of BOM and routing), and its associated details, for an item.

Navigation

Supply Planning > Refine Plan > Sourcing Information > Production Options

Production Type	Production options in PeopleSoft Supply Planning are always defined as <i>Production</i> . Rework and teardown production orders are visible to PeopleSoft Supply Planning but you cannot create new production of these types.
BOM Code	Displays the BOM identifier for the production option in the template. Production options can be predefined or created based on defaults specified at the item attributes by unit level.
BOM Quantity	Displays the BOM quantity used for scaling component quantity per assembly (QPA) for single output BOMs or the expected batch quantity expected for multiple output BOMs.
Routing Code	Displays the routing identifier for the production option in the template. If the corresponding item uses lead time instead of production routings, the system does not populate this field with a value.
Fixed Lead Time	Displays the fixed lead time of an item when generating planned orders without routings.
Variable Lead Time	Displays the variable lead time of an item when you generate planned orders without routings.

Use Lead Time	If selected, the associated item uses the fixed or variable lead times (instead of production routings) to schedule start and due dates for production.
Expected Yield % (expected yield percentage)	Displays the expected cumulative yield for the production order. PeopleSoft Supply Planning uses yield to inflate the starting quantity of production to account for loss that occurs during the manufacturing process.
Effectivity Dates	Displays the effectivity dates of the production option if the item is production option-controlled.

Review Purchase Options Page

Use the Review Purchase Options page (PL_PURCHASE_OPT) to review the purchase option definition and associated details, such as buyer, supplier SetID, supplier ID, and supplier location, for an item.

Navigation

Supply Planning > Refine Plan > Sourcing Information > Purchase Options

Lead Time Days	Displays the purchasing lead time specified for the supplier or item and supplier relationship. This value represents the amount of time it takes to get inventory from the supplier. The value depends on the values selected in the Purchase Sourcing box on the Item Attributes: Planning tab. The lead-time value follows the hierarchy by checking for which purchase sourcing options are used.
Purchase Yield	Defines the usable output from the purchase. The value is expressed as a percentage. Purchase yield is used in planning to inflate the planned quantity on purchases to account for any loss that may occur during the purchase process.

Refining Manufacturing Details

This topic provides an overview of work centers and BOM information.

Pages Used to Refine Manufacturing Details

Page Name	Definition Name	Usage
<u>Work Centers Page</u>	PL_WORK_CENTER	Review and maintain work center information included in the associated planning instance.
<u>Review Bills of Material - Components Page</u>	PL_BOM_COMP	Review general information about BOMs and their components.

Page Name	Definition Name	Usage
Review Bills of Material - Outputs Page	PL_BOM_OUTPUT	Review general information about BOMs and their outputs.
Review Bills of Material - Substitutes Page	PL_BOM_SUBSTITUTE	Review general information about BOMs and their substitutes.
Review Routings - Routings Page	PL_RTG	Review routing production information.
Review Routings - Resources Page	PL_RTG_RESRC	Review routing resource information.
Review Routings - Scheduling Page	PL_RTG_SCHED	Review routing scheduling information.
Review Routings - Times Page	PL_RTG_TIME	Review routing time information.

Understanding Work Centers

A work center can consist of one or more people and machines and can represent a logical grouping of machines, a department, or a cost center. You can assign each operation or task on a routing to a work center in which the operation or task takes place. Additionally, you can assign one or more resources (crew, machine, or tool) to each work center.

Define work center types by time or by unit. For work center types that you define by time, solvers plan capacity based on the amount of time available as defined on the appropriate manufacturing calendar. For work center types that you define by unit, solvers plan capacity based on the amount of units that can be produced at the work center as defined by the capacity multiplier definition on the work center itself.

You can associate work centers with a calendar to calculate capacity. If you do not associate a calendar with a work center, PeopleSoft Supply Planning uses the calendar on the work center business unit for all of the calculations.

Capacity Calculation

Consider:

- PeopleSoft Supply Planning defines capacity as 0 prior to the current time; no capacity is available before the current time.
- A specific work center is associated with a routing operation step.
- When you create a production operation, the system calculates required capacity and the work center usage is subtracted from the corresponding capacity bucket for the work center.
- Solvers record a violation if the work center capacity is exceeded for a given capacity bucket.

For partially completed operations, PeopleSoft Supply planning calculates the capacity requirement with the remaining quantity, using a new start time based on the duration for the remaining quantity and the actual end time.

- Rate parameters exist on the operation.

Values are *Setup*, *Fixed*, *Run*, *Post Production*, and *In Transit*. PeopleSoft Supply Planning always includes setup in the lead time calculation for the first operation. You can elect to ignore setup, however, for all of the remaining operations. Lead time calculation for a production operation is:

Intransit time for the previous operation (excluded for the first operation) + setup time (if you selected the Include Setup option) + fixed run + run rate * quantity.

Work center usage start time is equal to the production operation start time. The duration of work center usage includes any post production time. The system uses the work center calendar for the calculation of the duration and adds post production time to the production end time.

Capacity Calculation Example

Capacity multipliers are effective-dated and can vary over a period of time. Calendar periods used in all of the capacity calculations consider legal time only—the working period in the calendar—based on the bucket size:

- Daily = 24 hours
- Weekly = 7 days (starting from Sunday)
- Monthly = the number of days in the corresponding month

PeopleSoft Supply Planning calculates an initial capacity profile for all of the buckets from start of time to the end of time. For example, if the period start date is September 8, 2003 (a Monday), and you define the bucket size as *Weekly*, then the next period would begin on the following Sunday, September 14, 2003. Consider that you defined two capacity multipliers as September 1, 2003, until September 11, 2003, and from then on for the remaining time. The bucket from September 8, 2003, to September 12, 2003 (assuming a calendar week of five days) contains two varying capacity multipliers—one from September 8, 2003, to September 10, 2003, and another from September 11, 2003, to September 12, 2003.

PeopleSoft Supply Planning calculates the capacity when you create the resource as:

- For work centers defined as *By Time*:

Available Capacity = duration of a period in hours * capacity multiplier effective during the period * available percentage.

The duration of a period in hours includes the legal calendar period only.

- For work centers defined as *By Unit*:

Available Capacity = capacity from above / total number of hours in the period, specified by the bucket size.

The total number of hours for a daily bucket is 24. The total number of hours in the weekly bucket (7 days) is 7 * 24 hours. The total number of hours for a monthly bucket varies based on the number of days for the period. A utility function in PeopleSoft Supply Planning calculates the number of hours for the month.

In this example, the calculation for a work center defined as *By Time* is:

- Calendar is Monday to Friday, 8 a.m. to 4 p.m.
- Number of hours/day = 8

- Capacity multiplier of 1 is effective until September 11, 2003; a capacity multiplier of 2 is effective thereafter. Duration of hours from September 8, 2003, to September 10, 2003, is calculated as 8 hours/day * 3 days = 24 hours.
- Duration of hours from September 11, 2003, to September 12, 2003, is 8 hours/day * 2 days = 16 hours.
- The capacity in the bucket from September 8, 2003, to September 12, 2003, is 24 hours * 1 * availability percentage + 16 hours * 2 * availability percentage.

Common Elements Used in This Section

BOM Type

Only production BOM types defined are visible in PeopleSoft Supply Planning. Rework and teardown BOM types are not used to create new supply.

BOM Quantity

When BOMs contain a single item output, the BOM quantity acts as a scaling device that enables you to enter a product structure when the specifications of the end item are in a base greater than 1 unit.

When BOMs contain multiple outputs, if a primary item and co-products are specified as output items on the BOM, the BOM quantity represents the expected batch quantity for the order. Typically, this quantity matches the average order quantity of the primary item.

Effective Date and Obsolete Date

Displays the effective and obsolete dates for the components on a BOM.

Operation Sequence

Indicates where in the manufacturing process you need the component. The operation sequence refers to an operation on the routing of the assembly item. The default operation sequence is 0, which is the first operation of the manufacturing process.

Define operation sequence on the routing of the item by using the Routing Definition Summary page. If you set the operation sequence for all of the items to 0, the system assumes that all of the component items are needed at the beginning of production and, therefore, need to be issued at the start of the first operation.

Routing Type

Only those routing types defined as production types are visible to PeopleSoft Supply Planning. .

Routing Code

Displays the routing identifier for the production option in the template. If the corresponding item uses lead time instead of production routings, the system does not populate this field with a value.

The system reserves a routing code of 1 for the primary production routing of an item and uses it as the default routing for planning and costing (in PeopleSoft Supply

Planning, PeopleSoft Cost Management, and PeopleSoft Production Management), including production conversion cost calculations.

Expected Yield

Displays the cumulative expected yield for the entire order. PeopleSoft Supply Planning stores this value at the production header level.

Subcontracted

Select to indicate that the task is a subcontracted operation.

Work Center

The work center associated with the corresponding operation. Click the work center ID to access the Work Center page, where you can review and maintain work center details associated with the planning instance.

Work Centers Page

Use the Work Centers page (PL_WORK_CENTER) to review and maintain work center information included in the associated planning instance.

Navigation

Supply Planning > Refine Plan > Manufacturing > Work Centers

Resource Name

Displays the code and description of a specific work center.

Resource Class

Indicates whether you have defined the work center as an aggregate resource by time or an aggregate resource by unit.

- *Time*: You can plan for all of the resources based on the amount of time available in the time bucket that you select.
- *Unit*: You can plan for all of the resources based on the number of units the resources can produce in a time bucket.

Bucket Size

Displays the summation period over which you are aggregating capacity. Monthly buckets start on the first of the month and weekly buckets start on a Sunday.

Allocation Strategy

Displays the method that you use to spread the time and unit capacities when the operation crosses multiple buckets. Values are *Start*, *Finish*, and *Proportion*. For example, suppose that a task is stretched across two or more buckets, you might place the task capacity in its entirety in the first bucket, the last bucket, or spread the task capacity proportionally across all of the buckets.

Note: Work center types that you define as *By Time* can use the *Proportion* allocation strategy only.

Availability % (availability percentage)

Displays the percentage of the total capacity time that the resource is available for use. The percentage might include scheduled maintenance or a buffer for unexpected repairs. The

availability percentage is used to factor the available capacity for the entire planning horizon.

Calendar Code

Displays the run time calendar for the work center. You can associate a calendar code with the work center. If you use a production calendar, as opposed to a five-day work week definition, define at least one calendar code and the associated calendar on the Calendar Code Definition page.

Ignore Violations

Select this option to enable a solver to report over-capacity work centers, but not repair them during the capacity phases during the solver process.

You can select this option for noncritical work centers to enable the solvers to ignore these work centers and focus on critical work centers for capacity repair.

Average Daily Hours

Displays the average number of hours that the work center is in operation each day. This field determines the operation's setup, fixed run, run rates, and post production times in hours, when the time unit for an operation is expressed in days for planning and costing purposes.

For example, suppose that you set the run rate for an operation to 100 units per day and the average daily hours of the work center to 8 hours; the system converts this to 100 units per 8 hours.

Effective Date and Multiplier/Units

The system uses these fields to determine the available capacity on a work center. Using effective dates, you can vary the work center's available capacity over time.

If you define the work center as an aggregate resource by time, the system uses the capacity multiplier to represent the number of identical work centers that exist for scheduling purposes.

For example, suppose that you define a work center as an aggregate resource by time with weekly buckets, and it has a capacity multiplier of 2, with an effective date of March 5, 2002. Beginning on March 5, 2002, PeopleSoft Supply Planning views this aggregate resource as two identical work centers that it can use simultaneously for jobs. If the work center has 40 hours of available calendar time in a weekly bucket, then the available capacity for the bucket, based on a capacity multiplier of 2, is 80 hours total. PeopleSoft Supply Planning uses this capacity multiplier to determine the work center's available capacity until the next capacity multiplier becomes effective.

If you define the work center as an aggregate resource by unit, the system uses the capacity units to represent the number of units that can be produced on that work center in an entire bucket (assuming a 24 hours per day, 7 days per week calendar during the entire bucket). For example, suppose that you define a work center as an aggregate resource by unit with

weekly buckets. This resource has capacity units of 100 with an effective date of April 10, 2002. Beginning on April 10, 2002, PeopleSoft Supply Planning views this work center as being capable of producing 100 units per week, based on a 24-hour per day, 7 days per week calendar. The actual available capacity on this work center is then calculated by factoring in the actual production calendar during each weekly bucket. If the work center has 40 hours of available calendar time in a weekly bucket, then the available capacity for the bucket, based on a capacity unit of 100, would be $(100 \text{ units} * 40 \text{ hours per week}) / (24 \text{ hours per day} * 7 \text{ days per week}) = 24 \text{ units}$. PeopleSoft Supply Planning uses these capacity units to determine the work center's available capacity until the next capacity multiplier becomes effective.

Review Bills of Material - Components Page

Use the Review Bills of Material - Components page (PL_BOM_COMP) to review general information about BOMs and their components.

Navigation

Supply Planning > Refine Plan > Manufacturing > Review Bills of Material

Image: Review Bills of Material - Components page

This example illustrates the fields and controls on the Review Bills of Material - Components page. You can find definitions for the fields and controls later on this page.

Components | Outputs | Substitutes

Planning Instance TEST_PLAN

Business Unit US008

Item ID HB7100 Hub Subassembly

BOM Code 1 BOM Type Production

BOM Quantity 1 Standard UOM EA

Components Personalize | Find | View All | First 1-5 of 5 Last

Component ID	Description	Operation Sequence	Effective Date	Obsolete Date	Quantity	Per	Standard UOM
HB7101	Lever Cone	10	01/01/1900	12/31/2099	1.0000	Asy	EA
HB7102	Ball Retainer	10	01/01/1900	12/31/2099	1.0000	Asy	EA
HB7103	Brake Shell	10	01/01/1900	12/31/2099	1.0000	Asy	EA
HB7105	Compression Spring Subassembly	20	01/01/1900	12/31/2099	1.0000	Asy	EA
HB7110	Dust Cap	30	01/01/1900	12/31/2099	1.0000	Asy	EA

Return to Search | Notify | Previous tab | Next tab

Components | Outputs | Substitutes

Details

Select the Details tab.

Yield

Displays the expected percentage of usable components in a batch of components issued to production. A 100 percent yield assumes that the entire quantity of the component is usable and none are to be scrapped. The system considers component yield in the PeopleSoft Supply Planning to inflate component requirements to account for the expected loss during the assembly process. When scheduling the number of components to be used in production, the system divides the required quantity by the component yield value to derive the scheduled quantity. For example, suppose that an assembly has a demand of 100 units and the quantity per assembly is 1 with a component yield of 90 percent, then planning requires 111 components ($100/.90$). If the expected 10 percent yield loss occurs, 11 components ($111 \times .10$) are unusable, leaving you with the original required 100 components. When calculating the cost of the assembly, the system includes the component yield loss, thereby increasing the cost contribution of the component.

Substitutes Exist

Indicates whether you have defined substitutes on the BOM for this component item. You can review substitute information on the Substitutes tab.

Review Bills of Material - Outputs Page

Use the Review Bills of Material - Outputs page (PL_BOM_OUTPUT) to review general information about BOMs and their outputs.

Navigation

Supply Planning > Refine Plan > Manufacturing > Review Bills of Material

Output Type

Displays the type of output associated with the BOM. Output types include *Primary*, *Co-product*, *Recycle*, *Teardown*, and *Waste*.

- If you have only one output on this BOM, then it is the primary output.
- A co-product is an item that is produced as part of the manufacturing process along with the primary output. It shares the cost of the process, and there may be independent demand in PeopleSoft Supply Planning for this item. Orange juice and orange concentrate are examples of co-products.
- A by-product can be a waste product that needs to be disposed of or a recycle by-product that can be used as an input to other processes. The by-product is incidental to the process and has a relief (negative) cost for recycle by-products or a disposal (positive) cost for waste by-products. Waste by-products might not have cost associated with them. Usually, there is no independent demand for by-

products. Orange pulp is an example of a recycled by-product.

Review Bills of Material - Substitutes Page

Use the Review Bills of Material - Substitutes page (PL_BOM_SUBSTITUTE) to review general information about BOMs and their substitutes.

Navigation

Supply Planning > Refine Plan > Manufacturing > Review Bills of Material

Priority	Displays the substitute item's priority relative to other substitute options. The planning engine considers substitute items with the highest priority (the lowest number) first.
Substitute Item ID	Displays the unique substitute item for the item. When you define substitutes for items on the Manufacturing BOMs - Components: Substitutes page, PeopleSoft Supply Planning automatically selects these substitutes when the quantity on hand for discontinued items run out. If you do not define substitutes for items designated as discontinued, a shortage of that item might occur if demand exceeds the existing quantity on hand. See "Maintaining BOMs" (PeopleSoft FSCM 9.2: Manufacturing).
From Date and To Date	Displays the start and end date to indicate when the substitution is valid.
Rate	Indicates the quantity of the substitute item required to replace the original item in the item's standard UOM. The conversion rate can be different at the SetID, business unit, and BOM levels.

Review Routings - Routings Page

Use the Review Routings - Routings page (PL_RTG) to review routing production information.

Navigation

Supply Planning > Refine Plan > Manufacturing > Review Routings

Continuous Scheduling	Select to complete the corresponding operation in a single run of continuous valid calendar time, with no down time.
Ignore Capacity	Select to prevent solvers from checking the corresponding operation for capacity violations.

Operation Yield % (operation yield percentage)	Displays a percentage of the quantity of goods expected to make it through the operation. In many manufacturing processes, parent items (subassemblies, primary items, or final assemblies) are lost during manufacturing. This loss manifests itself as assembly scrap, which can be due to breakage, poor quality, or nonconformance to specifications. Use operation yield percentage to incorporate expected loss into the cost of the usable end items. Additionally, PeopleSoft Supply Planning can use the process yield to increment the demand by calculating the additional resources necessary to meet the scheduled quantity with the anticipated yield loss.
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Review Routings - Resources Page

Use the Review Routings - Resources page (PL_RTG_RESRC) to review routing resource information.

Navigation

Supply Planning > Refine Plan > Manufacturing > Review Routings

Crew Size	Displays the number of people in a given crew for the operation
Machine Resources	Displays the number of machines used at the operation.
Resource Type	Displays the type of resource used. Valid resources are primary or alternate machine, crew, or tool.
Crew/Machine/Tool	Displays the machine, crew, or tool code, as well as the description.
Status	Displays the availability of a resource for this work center.
Quantity Used	Displays the number of tools used at the operation. This option applies to tools only.
Priority	Displays the relative priority between alternate resources. The lowest number represents the highest priority.

Review Routings - Scheduling Page

Use the Review Routings - Scheduling page (PL_RTG_SCHED) to review routing scheduling information.

Navigation

Supply Planning > Refine Plan > Manufacturing > Review Routings

Intensity	This value appears by default from the task and determines the basis of the scheduling. Values are:
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Labor Time: The start and due date of the operation can be based on the operation's labor time (labor intensive).

Machine Time: The start and due date of the operation can be based on the operation's machine time (machine intensive).

Longest: The start and due date can be based on the longest of the two times, evaluated for each time type in the operation.

For example, suppose that labor setup is 7 minutes, machine setup is 10 minutes, labor run is 20 minutes, machine run is 25 minutes, labor fixed run is 11 minutes, and machine fixed run is 7 minutes, the total operation time would be machine setup (10) + machine run (25) + labor fixed run (11) = 36 minutes.

Cumulative: The start and due date can also be based on the sum of the machine and labor time.

Method of Operation Overlap

Indicates whether a subsequent operation can begin prior to the completion of the prior operation. Values are:

- *No Overlap:* The subsequent operation does not overlap.
- *Percentage:* The subsequent operation overlaps by a percentage of elapsed run time completed. If this value appears, the Overlap % (overlap percentage) field appears.
- *Send Ahead:* The subsequent operation begins when a specified number of units are accumulated or finished. If this value appears, the Send Ahead field appears.

Review Routings - Times Page

Use the Review Routings - Times page (PL_RTG_TIME) to review routing time information.

Navigation

Supply Planning > Refine Plan > Manufacturing > Review Routings

Operation Time

Use in conjunction with the time unit, defines the amount of time to complete one unit.

Time Unit

Displays the unit of time for the corresponding operation time. For example, suppose that 5 is the value that appears in the Operation Time field and *Days* is the value that appears in the Time Unit field. Then the operation completes one unit every five days. The system determines the number of hours in a day by the work center's average daily hours, defined on the Work Center Definition page. .

Operation Rate

Use in conjunction with the rate unit. Defines the rate at which operations are completed.

Rate Unit

Displays the unit of time for the corresponding operation rate.

For example, suppose that 3 is the value that appears in the Operation Rate field, and *Units/Day* is the value that appears in the *Rate Unit* field. The operation completes three units every day.

Include Setup

Select to indicate that the system considers setup in the operation lead time calculation. If you elected to include setup, the setup time is factored into the task or operation's lead time.

The system always considers setup in the lead time calculation of the first operation, if setup is specified, regardless of the check box setting. This option applies only to *Planning Labor Setup* and *Planning Machine Setup* operation types.

If this option is not selected, setup can begin prior to any production units arriving at the work center. The system assumes that setup can occur at any time after the start of production and does not include it as part of the item's lead time, except at the first operation.

Refining Forecasting Details

This topic discusses how to refine forecasting details.

Pages Used to Refine Forecasting Details

Page Name	Definition Name	Usage
<u>Review Planning BOMs Page</u>	PL_PLN_BOM_COMP	Review at a summary level all of the components that comprise a planning BOM for a group of assembly items or product families in a specific business unit.
Review Aggregate Demand Items	PL_AGG_DMD	Review the relationships between BOMs and aggregate items.
Review Demand Calendar Weights	PL_DMD_WGHTS	Review the calendar attributes that determine the importance placed on the demand for a specific period.
<u>Actual Forecasts Page</u>	PL_FCST_UNC	Review original forecast information from PeopleSoft Publish Forecast tables (including items, quantities, and time buckets for comparison against actual demand), delete existing forecasts, and add new forecasts.
<u>Net Forecast Page</u>	PL_FCST_DMD	Update forecast net forecast parameters such as forecast date, frozen flag, and demand priority.

Review Planning BOMs Page

Use the Review Planning BOMs page (PL_PLN_BOM_COMP) to review at a summary level all of the components that comprise a planning BOM for a group of assembly items or product families in a specific business unit.

Navigation

Supply Planning > Refine Plan > Forecasting > Review Planning BOMs

BOM Quantity	BOM quantities enable you to enter product structures when the end item's specifications are in a base greater than one unit.
Effective Date and Obsolete Date	Displays the effective and obsolete dates for the components on the planning BOM. The system explodes to components only those forecasts that are in effect during this date range.

Actual Forecasts Page

Use the Actual Forecasts page (PL_FCST_UNC) to review original forecast information from PeopleSoft Publish Forecast tables (including items, quantities, and time buckets for comparison against actual demand), delete existing forecasts, and add new forecasts.

Navigation

Supply Planning > Refine Plan > Forecasting > Actual Forecasts

Percentage Multiplier	Displays the percentage to increase or decrease all of the forecast quantities that appear in the forecast schedule. Percentage multipliers greater than 100 increase the forecast quantities; percentage multipliers less than 100 decrease the forecast quantities.
Calculate	Click to apply the percentage multiplier. All of the forecast rows in the forecast schedule are impacted by the calculation.
Start Date/Time and End Date/Time	Displays the starting and ending dates that represent the period which the forecast quantity applies. For example, PeopleSoft Publish Forecast tables might provide forecasts in monthly buckets. In this case, the start and end dates represent the start and end of the month for which the forecast quantity applies. The system uses the demand calendar weights to translate the actual forecast period information into the PeopleSoft Supply Planning forecast buckets.
Forecasted Quantity	This value represents the unconsumed total forecast for the corresponding period from PeopleSoft Publish Forecast tables or PeopleSoft Inventory. This field is required.

Net Forecast Page

Use the Net Forecast page (PL_FCSTFULFILL_DMD) to review adjusted forecast details.

Navigation

Select any value in the Adjusted Forecast Quantity field on the Forecast Fulfillment Summary page.

Family Forecast	Select to indicate that the forecast was allocated to the item as a result of a planning BOM or aggregate demand relationship.
Forecast Date/Time	Displays the current date PeopleSoft Supply Planning intends to fulfill the outstanding forecast demand.
Original Date/Time	Displays the date that the forecast consumption process intended the outstanding forecast demand be fulfilled.
Forecasted Quantity	Displays the portion of the net forecast quantity for the date specified.
Frozen	Select to change the status of the forecast to frozen; the solvers do not delay or cancel net forecast quantities that have been frozen.
Priority Rank	Displays a numeric value ranging from 1 (highest priority) to 999 (lowest priority) used by the planning engine to determine the order in fulfilling various independent demands, which include forecast demand. The priority 0 is reserved for the system.
<hr/>	
Note: You cannot enter the value 0 in the Forecast Priority Rank field.	
<hr/>	
Include Quantity	Select to include the forecast in all of the planning functions. The system populates this field by default.
	This option enables you to load a forecast in PeopleSoft Supply Planning and ignore the forecast during simulations. If you do not include the forecast quantity, the forecast appears on the net forecast maintenance page only; the forecast quantity does not appear on workbenches or reports and is ignored by solvers.
Cancel	Select and click the Save button to cancel the forecast.

Note: Updates to the net forecast are not reflected in the solution until the next solver run.

Refining Inventory Details

This topic provides an overview of extra demand.

Pages Used to Refine Inventory Details

Page Name	Definition Name	Usage
<u>Transfer Orders Page</u>	PL_TRANSFER	Review and maintain parameters for interunit transfer orders, such as planning parameters, dates, and quantities.
<u>Planned Transfer Orders Page</u>	PL_PLN_TRNS	Review and maintain parameters for planned interunit stock requests manually created or created by the solver, such as planning parameters, dates, and quantities
<u>Stock Requests Page</u>	PL_STOCK_REQUEST	Review and maintain information about internal and external demand orders on an inventory business unit, such as planning parameters, dates, and quantities.
<u>Extra Demand Page</u>	PL_EXTRA_DEMAND	Create or delete simulated customer orders for point demands that are not forecasted (simulations may include new product introduction or extra usage demands for which you may have an unexpected lack of supply), and model demands on inventory from other sources, such as spare parts planning, quality assurance demands, shrinkage, and so forth.

Understanding Extra Demand

Extra demand is a demand transaction that enables you to model demands on inventory from other sources (such as spare parts planning, quality assurance demands, and shrinkage), and simulate what-if scenarios for point demands that are not forecasted.

All of the extra demand in PeopleSoft Supply Planning is related to a specific planning instance. Extra demand cannot be shared across planning instances. During the Load Planning Instance process, you can retain prior extra demand for the planning instance or delete extra demand for the planning instance.

Extra demand transactions are visible only to the planning environment and stored in the Planning Instance Extra Demand table (PL_EXTRA_DMD). PeopleSoft Supply Planning does not commit extra demand data to the transaction system.

Extra demand uses demand priority to enable solvers to create feasible plans. The solvers see extra demand as another demand stream that can consume forecast. Unless you select the frozen option for an extra demand, solvers can reschedule that extra demand to another due date. Each extra demand is independent of any other demand.

Common Elements Used in This Section

Approved	Select to approve an order manually. The system sends the order back to the transaction system as an approved order, and bypasses the approval logic in the Post Updates process.
Backorder Base	Represents the portion of the quantity requested base that could not be fulfilled with the business unit's current quantity available for the item. The value is recorded in the standard UOM.
Configuration Code	A non-active field that is related to a deprecated product.
Consume Forecast	Select to consider demand when running the Forecast Consumption process.
Demand Line	<p>In PeopleSoft Inventory, orders for stock consist of demand lines. A demand line is the smallest request for stock that can be processed by the various fulfillment processes.</p> <p>If an order line can be fulfilled with the available on-hand quantity in the business unit, it is assigned one demand line (line number 1), requesting the total quantity required to fulfill the order line. If the order line cannot be fulfilled with the available on-hand quantity and partial quantities are allowed, the system generates a backorder (if you have elected to cancel backorders, the additional quantity requested is canceled). The backorder process adds a demand line for the unfulfilled quantity; the only change in the demand key for the second demand line is the demand line number (line number 2).</p>
Demand Source	Displays the source of the independent demand.
Frozen	<p>Select to change the status of the order to frozen; the system does not reschedule frozen demands during the solver process.</p> <p>Frozen demands cannot be delayed, even if the demand priority defined for a frozen demand is lower than the demand priority for demand that is not frozen.</p>
Include Quantity	<p>Select to include the corresponding inventory transaction quantity in all of the planning functions. The system populates this field by default.</p> <p>This option enables you to load an order in PeopleSoft Supply Planning and ignore the order during simulations. If you do not include an order quantity, the order appears on the corresponding refine page only; the order does not appear on workbenches or reports and is ignored by solvers.</p>
Line	Displays the order line number.
Order Number	Displays the unique order ID for the corresponding inventory transaction. You can define order numbers manually or set up automatic numbering in PeopleSoft Inventory. If you use automatic numbering, PeopleSoft Inventory generates an order

number based on the default sequence that you defined on the User Preferences - Inventory page; if no default sequence exists, the system generates a number based on the default sequence that you specified for material stock requests on the Automatic Numbering page.

Pick Base

Represents the picked quantity in the item's standard UOM.

Planning Arrival Date/Time

The current scheduled transfer arrival date to the destination business unit. The system validates this value against the receiving calendar.

Note: When you change either the Planning Date/Time or Planning Arrival Date/Time value, the system recalculates the other based on lead time.

Planning Date/Time

The current scheduled transfer shipping date from the source business unit. The system validates this value against the shipping calendar.

This value must be less than or equal to the value in the Planning Arrival Date/Time field.

Note: When you change the value in either the Planning Date/Time or Planning Arrival Date/Time field, the system recalculates the other based on lead time.

Priority and Priority Rank

Enter a demand priority value between 1 and 999. The system assigns priorities to demands during the Load Planning Instance process based on established demand priority rules. In the absence of demand priority rules or for a matching demand priority rule for a given demand, the system assigns to the priority 999. The system also uses the demand priority value, 999, as a default value when assigning priorities. When manually adding demand to a planning instance, specify the priority.

See [Setting Up Demand Priority Rules](#).

Note: The priority 0 is reserved for the system.

Requested Base

Represents the order quantity in the source business unit. You cannot enter a negative value for this field. This field is required.

If you modify the value in this field, you must enter a value equal to or greater than the value in the Pick Base field.

Reserved

If selected, indicates that the system inserted the order line into the PeopleSoft Inventory IN_DEMAND table by some form of reservation processing: soft reservation, nonsoft reservation,

	ATP reservation, or lot allocation. Once inserted into IN_DEMAND, the order line can be released for picking.
Schedule	Displays the schedule number.
Scheduled Arrival Date/Time	Date that the transaction system expects to receive the transfer in the destination business unit.
Scheduled Date/Time	Date that the transaction system expects to ship from the source business unit.
Ship Base	Represents the portion of the quantity requested base confirmed as shipped in the item's standard UOM.
Ship Via	Displays shipping method.

Transfer Orders Page

Use the Transfer Orders page (PL_TRANSFER) to review and maintain parameters for interunit transfer orders, such as planning parameters, dates, and quantities.

Navigation

Supply Planning >Refine Plan >Inventory >Transfers.

Note: You cannot add or delete transfer orders on this page.

Schedules

Select the Schedules tab.

Schedule	In order to make sure that overflow issue does not occur when bringing the line number into planning, divide the Stock Request schedule line number from PeopleSoft Inventory by 100 during the LOAD. For example, a transfer Stock Request schedule line number of 1 from Inventory, will be displayed as 0.01 on the Transfer Orders page in Supply Planning. Then convert it back during the POST process.
Interunit Status	<p>Values are:</p> <ul style="list-style-type: none"> • <i>Cancelled:</i> The Interunit Status field is the only field available for entry. The value, <i>Open</i>, is the only other available value when the status is <i>Cancelled</i>. • <i>Open:</i> All of the maintainable fields are available for entry. The value, <i>Cancelled</i>, is the only other available interunit status value when the status is <i>Open</i>. • <i>Picked:</i> The Interunit Status and Requested Base fields are not available for entry. • <i>Intransit:</i> The Include Quantity and Consume Forecast fields are available for entry.

- *Received*: The Include Quantity and Consume Forecast fields are available for entry.

Quantities

Select the Quantities tab.

Remaining Demand	Displays the outstanding demand for the source business unit.
Remaining Supply	Displays the outstanding supply expected for the destination business unit.
Allocated Base	Displays the quantity allocated to the order line, in the item's standard unit of measure.

Activity

Select the Activity tab.

Receipt Base	Displays the current quantity received for the destination business unit in the item's base UOM.
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Inventory Pegging

Select the Inventory Pegging tab.

Peg Status	Displays the pegging status of the line item. <ul style="list-style-type: none"> • <i>Unpegged</i> This line item does not have pegged demand. • <i>Open</i> This line item is pegged to demand that has yet to be fulfilled. • <i>Completed</i> This line item is pegged to demand that has been fulfilled.
Peg Details	Click the link to display the pegged demand information. This column will only be available if the Peg Status is Open or Completed.

Planned Transfer Orders Page

Use the Planned Transfer Orders page (PL_PLN_TRNS) to review and maintain parameters for planned interunit stock requests manually created or created by the solver, such as planning parameters, dates, and quantities.

Navigation

Supply Planning > Refine Plan > Inventory > Planned Transfers

Note: You can add and update transfers on this page.

Planning Sequence Number

Represents the numbering scheme that the system uses to keep planned orders in the Planning Instance table synchronous with those in the transaction system.

Each time that you run the Load Planning Instance process in regeneration mode, the process initializes the next available planning sequence number to zero. The process resequences all of the planned orders that exist in the transaction system when inserting them into the Planning Instance tables. After inserting all of the orders into the tables, the process updates the next available planning sequence number on the Planning Instance table to equal the last planning sequence number used, plus one.

When new planned orders are inserted in the planning instance, the system increments the planning sequence number for each new record.

Delete

Click to delete the planned transfer order.

Status

Displays the current status for the planned transfer. Values are:

- *Canceled*: PeopleSoft Supply Planning does not pass canceled orders back to the transaction system.
- *Planned*: The system deletes all of the planned orders when you run the Material and Capacity Feasible solver in regenerative mode.
- *Firmed*: The system does not delete planned orders with a status of *Firmed* when you run the Material and Capacity Feasible solver in regenerative mode but can cancel them. Solvers can reschedule firmed orders provided the order is not frozen.

Intransit

Displays the number of days and hours required to transfer the item between business units.

Stock Requests Page

Use the Stock Requests page (PL_STOCK_REQUEST) to review and maintain information about internal and external demand orders on an inventory business unit, such as planning parameters, dates, and quantities.

Navigation

Supply Planning > Refine Plan > Inventory > Stock Requests

Note: Solvers consider material stock requests (MSRs) as single point demands that have no sourcing options and are supplied internally or externally on the request date.

Note: You cannot add or delete stock requests on this page. Enter and maintain stock requests in the PeopleSoft Supply Chain Management system on the Fulfill Stock Orders - Stock Requests page.

Schedules Tab

Select the Schedules tab.

Cancel

Select to cancel the stock request. If you cancel a stock request, you also remove its demand from the planning instance.

Quantities

Select the Quantities tab.

Allocated Base

Displays the quantity allocated to the order line, in the item's standard unit of measure.

Remaining Quantity

Displays the outstanding demand due for the stock request.

Details

Select the Details tab.

Confirm

If selected, indicates that the specified quantity has been picked from the appropriate storage location. Picked lines must be confirmed before they are eligible for the Picking Confirmation process.

If the demand line is picking confirmed, the Cancel field on the Schedules tab, and the Requested Base field on this tab are not available for entry.

Shipped

Select to indicate that the stock request has shipped. If the demand line has been shipped, only the Include Quantity and Consume Forecast fields on the Schedules tab are available for entry.

Post Ship Complete

Select to indicate that shipped quantities have been depleted from inventory.

Inventory Pegging

Select the Inventory Pegging tab.

Peg Status

Displays the pegging status of the line item.

- *Unpegged* This line item does not have pegged demand.
- *Open* This line item is pegged to demand that has yet to be fulfilled.
- *Completed* This line item is pegged to demand that has been fulfilled.

Peg Details

Click the link to display the pegged demand information. This column will only be available if the Peg Status is Open or Completed.

Extra Demand Page

Use the Extra Demand page (PL_EXTRA_DEMAND) to create or delete simulated customer orders for point demands that are not forecasted (simulations may include new product introduction or extra usage demands for which you may have an unexpected lack of supply), and model demands on inventory from other sources, such as spare parts planning, quality assurance demands, shrinkage, and so forth.

Navigation

Supply Planning > Refine Plan > Inventory > Extra Demand

Note: You can add and update extra demand on this page.

Delete	Click to delete the extra demand order from the planning instance.
Scheduled Quantity	Enter the number of items to include in the order. The value that you enter here cannot be a negative number. This field is required.
Comments	Enter a description of the order.

Refining Order Management Details

This topic discusses how to maintain sales orders, quotes, and buying agreements.

Note: The Sales Order Demand tables reflect the sales order demand in the transaction system. However, the transaction system is the system of record. Changes that you make to the PeopleSoft Supply Planning Sales Order Demand tables are not automatically updated in the transaction system.

Pages Used to Refine Order Management Details

Page Name	Definition Name	Usage
<u>Sales Orders/Quotes Page</u>	PL_SO_HDR	Review and maintain parameters for sales orders and quotes, such as order lines and shipment quantities.
<u>Review Post Errors - Buying Agreements Page</u>	PL_BUYING_AGREEMNT	Review and maintain parameters for buying agreements, such as releases, order quantities, and expected shipment dates.

Sales Orders/Quotes Page

Use the Sales Orders/Quotes page (PL_SO_HDR) to review and maintain parameters for sales orders and quotes, such as order lines and shipment quantities.

Navigation

Supply Planning > Refine Plan > Order Management > Sales Orders/Quotes

Common Information

Business Unit

For sales order and quote transactions, this business unit represents the PeopleSoft Order Management business unit.

Start Date

Displays the date that the buying agreement becomes valid. The term of the buying agreement can span multiple fiscal years. This field appears on the Buying Agreements page only.

Grace End Date

Displays an automatic extension date beyond the end date of the buying agreement. Orders entered after the buying agreement expiration date are based on the buying agreement price until the grace end date. If you have not provided an extension, a 0 appears as the value in this field. This field appears on the Buying Agreements page only.

Order Date

Displays the initial date that you created the order. This field appears on the Sales Orders/Quotes page only.

Order Type

Indicates whether the order is a sales order or a quote order. This field appears on the Sales Orders/Quotes page only.

Order Status

Select a valid order header status. Values are:

- *Canceled*: Select to cancel the order before any shipments are made or if the line or schedule is no longer valid.
- *Closed*: Indicates that the schedules have been fully shipped or if the first shipment was made and backorders were canceled.
- *Pending*: Indicates that the order requires additional information.
- *Open*: Indicates that the customer order is an active demand in the system.

Note: On this page, you can change the order status from *Open* to *Canceled*, or from *Canceled* to *Open*.

Quote Due Date

Displays the quote deadline specified by the customer or prospect. This field appears on the Sales Orders/Quotes page only.

Quote Expiration Date

Displays the expiration date on which prices and terms on the quote are no longer valid. This field appears on the Sales Orders/Quotes page only.

Success Percent

Displays the forecasted success that the quotation will result in a sales order. Quotations are loaded into the planning instance as demand when their success percentage is greater than the percentage that you define in the Accept % (accept percentage) field on the Load Planning Instance - Orders/Forecast: Orders page. This field appears on the Sales Orders/Quotes page only.

Line

Displays the order line number.

Schedule

Displays the schedule line number.

At the schedule level, break down the order quantity into one or more shipments. An order can include multiple lines, and each line can have multiple schedules. The number in this field increases by the increment value that you defined on the Order Management Definition - Order Management Setup page.

See "Maintaining Order Schedule Information" (PeopleSoft FSCM 9.2: Order Management).

Kit

Displays the product kit code.

A product kit is a fixed set of components that are sold as a unit. A product kit is not a stockable inventory item, but its components may be.

PeopleSoft Supply Planning assumes that kit components are shipped together—including configured or custom kits—in one sales order.

Note: All of the kits for a schedule must have the same ship date and time. If you change a kit ship date and time, the system also updates the ship date and time of the other items in the kit.

See "Maintaining Header and Line Information" (PeopleSoft FSCM 9.2: Order Management)

Schedules

Select the Schedules tab.

Status

Displays a valid order line status. Values are:

- *Canceled:* Select to cancel the order before any shipments are made or if the line or schedule is no longer valid.
- *Closed:* Indicates that the schedules have been fully shipped or that the first shipment was made and backorders were canceled.

- *Pending*: Indicates that the order requires additional information.
- *Open*: Indicates that the sales order line is an active demand in the system.

Note: You can change the line status from *Open* to *Canceled* or from *Canceled* to *Open*.

Ship Base

Displays the quantity shipped. This is expressed in the item's standard UOM.

If the demand line has already been shipped, this value is the quantity shipped. If the line has not been shipped, this value is the quantity picked.

Remaining Quantity

Displays the outstanding demand for the shipment schedule.

Frozen

Select to change the status of the order to frozen; the system does not reschedule customer orders that are frozen.

Include Quantity

Select to include the order in all of the planning functions. The system selects this field by default for all of the customer orders and buying agreements in the planning instance tables.

This option enables you to load an order in PeopleSoft Supply Planning and ignore the order quantity during simulations.

If you do not include the order quantity, the order or buying agreement appears on the corresponding maintenance page only; the order does not appear on workbenches or reports and is ignored by solvers.

Priority Rank

Enter a demand priority value between 1 and 999. The system assigns priorities to demands during the Load Planning Instance process based on established demand priority rules. In the absence of demand priority rules or for a matching demand priority rule for a given demand, the system assigns the priority 999. The system also uses the demand priority, 999, as a default value when assigning priorities. When manually adding demand to a planning instance, specify the priority.

See [Setting Up Demand Priority Rules](#).

Note: The priority 0 is reserved for the system.

Quantities

Select the Quantities tab.

Schedule Base

Define the scheduled shipment quantity. This is expressed in the item's standard UOM. You cannot define this field with a negative value. This field is required.

Note: This field appears on the Sales Orders/Quotes page only.

Shipments

Select the Shipments tab.

Ship From

Displays the PeopleSoft Inventory ship from business unit.

Estimated Ship ID

Select an estimated shipment code.

Estimated shipments are logical groupings that indicate what can be packed into the same shipping container. These groupings are temporary—the estimated shipment ID for a demand line can change at any time until freight has been calculated. If a demand line does not meet the criteria for an existing estimated shipment, the system creates a new estimated shipment for the line. Demand lines that have already been freighted (and, therefore, assigned to an estimated shipment) are not available to be packed.

Note: Schedules sharing the same estimated ship ID must also have identical planning ship date and times.

Planning Ship Date/Time

Displays the current scheduled ship date PeopleSoft Supply Planning intends to ship.

Target Date/Time

Displays the requested date or scheduled ship date, depending on the date that you selected in the Demand Date field on the Load Planning Instance - Orders/Forecast: Orders page. PeopleSoft Supply Planning attempts to generate supply for the demand by this date.

Scheduled Ship Date/Time

Displays the date that the transaction system expects to ship.

Details

Select the Details tab.

Product ID

Displays the product ID for the sales order line from the original customer order in the order management system.

Reserved

Select to indicate that the customer order line has a quantity reserved by one of the reservation or lot allocation processes in the inventory system.

Inventory Pegging Tab

Select the Inventory Pegging tab.

Peg Status

Displays the pegging status of the line item.

- *Unpegged:* This line item does not have pegged demand.

- *Open:* This line item is pegged to demand that has yet to be fulfilled.
- *Completed:* This line item is pegged to demand that has been fulfilled.

Peg Details

Click the link to display the pegged demand information. This column will only be available if the Peg Status is Open or Completed.

Refining Production Control Factors

Note: Planned production orders in PeopleSoft Supply Planning are orders that have not been committed in the transaction system. The Planned Production component enables you to maintain planned production created by the solvers or planned production that you created manually. You can add or delete planned production in the Planned Production component.

The Production component enables you to maintain production from the transaction system. You cannot add or delete production orders in the Production component.

Pages Used to Refine Production Control Parameters

Page Name	Definition Name	Usage
Production - Production Page	PL_PRD_HEADER	Review and maintain general production order parameters.
Production - Operations Page	PL_PRD_OPERATIONS	Review and maintain operation details and attributes for production orders.
Production - Resources Page	PL_PRD_RESRC	Review the machines, crews, and tools used by the production ID. You can include this information on the Detail Resource report.
Production - Times Page	PL_PRD_TIMES	Review and maintain operation time details for production orders.
Production - Components Page	PL_PRD_COMPONENTS	Review and maintain production order component details.
Production - Outputs Page	PL_PRD_OUTPUTS	Review and maintain production order output details.
Planned Production - Production Page	PL_PLNPRD_HEADER	Review and maintain general planned production order parameters. Production - Production Page

Page Name	Definition Name	Usage
Planned Production - Operations Page	PL_PLNPRD_OP	Review and maintain operation details and attributes for planned production orders. Production - Operations Page
Planned Production - Times Page	PL_PLNPRD_TIMES	Review and maintain operation time details for planned production orders. Production - Times Page
Planned Production - Resources Page	PL_PLNPRD_RESRC	Review the machines, crews, and tools used by the production ID. You can include this information on the Detail Resource report. Production - Resources Page
Planned Production - Components Page	PL_PLNPRD_COMP	Review and maintain planned production order component details. Production - Components Page
Planned Production - Outputs Page	PL_PLNPRD_OUT	Review and maintain planned production order output details. Production - Outputs Page

Common Elements Used in This Section

Configuration Code

A non-active field that is related to a deprecated product.

Intensity

This value appears by default from the task and determines the basis of the scheduling. Values are:

Labor Time: The start and due date of the operation can be based on the operation's labor time (labor intensive).

Machine Time: The start and due date of the operation can be based on the operation's machine time (machine intensive).

Longest: The start and due date can be based on the longest of the two times, evaluated for each time type in the operation.

For example, suppose that labor setup is 7 minutes, machine setup is 10 minutes, labor run is 20 minutes, machine run is 25 minutes, labor fixed run is 11 minutes, and machine fixed run is 7 minutes, the total operation time would be machine setup (10) + machine run (25) + labor fixed run (11) = 36 minutes.

Cumulative: The start and due date can also be based on the sum of the machine and labor time.

Operation Overlap % (operation overlap percentage)

Displays the percentage of processing time remaining at one operation before the next operation can start. An overlap percentage of 100 percent means that the next operation can start at the same time as the current operation. An overlap percentage of 5 percent means that 95 percent of the operation must be completed before the next can start. Operation overlap cannot be less than 0 percent or more than 100 percent, and there can be no overlap on the last routing operation sequence or prior to a subcontracted operation. However, the supplier can send the end item back in multiple shipments. Therefore, you can define operation overlap for a subcontracted operation.

Operation Sequence

Displays where you need the components in the manufacturing process. PeopleSoft Production Management uses the work center associated with each operation and the WIP location associated with each work center to determine where to deliver components. The component's issue method in combination with the operation sequence determines when and where the material is delivered and how the system updates inventory in the WIP location or the issue quantity on the component list.

When the system sets the operation sequence to zero or an invalid operation sequence is specified, it is assumed that the component item is to be used at the first operation.

Original Start Date/Time and Original End Date/Time

Displays the date and time that the transaction system intends to start and end the operation.

Production ID

Displays the unique ID assigned to a production order or schedule in PeopleSoft Production Management.

Production Type

Specifies the production type. Values are:

- *Production*: Used for regular manufacturing. The system uses the production BOM to determine the material that needs to be issued and consumed. The BOM is also used as the basis for valuation and for calculating cost variances. In addition, the system uses the specified production routing for the end item to determine the operations that are necessary to manufacture the end item.
- *Rework*: Used when you need to do additional or repair work on a completed end item. In this case, the system can use a rework BOM to issue and consume material when you have a standard rework process that requires additional components. Whether or not you have a rework BOM, the system automatically adds the end item being reworked to the component list when you release the rework production ID. The system automatically applies the kit issue method to the end item being reworked when the component list is created. You can add other components to the component list as needed to repair or rework the end item, and the system uses the issue method set at the production area and item level for each component.

- *Teardown:* Used when you need to break an end item down into its component parts and return the components to inventory. The system does not use a BOM for teardown production but issues the completed end item as the component. You designate the component parts that result from tearing down the end item as teardown outputs on the output list.

Send Ahead Quantity

Displays the number of units that must be accumulated or finished before they can be sent to the next operation and the next operation can begin. The send ahead quantity must be a positive number. Whether a whole number or a decimal appears depends on the item's UOM and quantity precision combination that was defined in PeopleSoft Inventory. For example, suppose that item ID A0007 has a UOM of *EA* and a *Natural Round* whole number combination, then you can only enter whole numbers.

Sequence

Displays the planning sequence number that the system assigned to track planned orders during the planning cycle.

This field appears in the Planned Production component only.

Work Center

Work center where the operation step and tasks are performed.

Production - Production Page

Use the Production - Production page (PL_PRD_HEADER) to review and maintain general production order parameters.

Navigation

Supply Planning > Refine Plan > Production Control > Production



Click the Show Supply button to access the Show Supply page. You use the page to view details about the planning instance that includes the order details.



Click the Show Demand button to access the Show Demand page where you can review the order and order type and the due date for the production.

Status and Plan Status

Indicates where the production ID or production schedule is in the production cycle. Values are:

- *Canceled:* This status cancels existing production quantities associated with a production ID. You can cancel production if the production status is *Entered*, *Firmed*, or *Released*. You cannot cancel a production ID with subcontracted operations if a PO has been generated against the production ID.

You can change this status back to its original status, or to any status available to the original status. For example, if the original status was *Firmed*, you can change the *Canceled* status to *Firmed* or *Released*.

- *Entered*: The system recognizes a production ID's quantity, start date, and due date, but the order has no operation list or component list. PeopleSoft Supply Planning considers *Entered* production IDs and production schedules as supply, but does not plan for operations or components. In addition, the system creates a display-only output list for *Entered* production. If production is for a single output item, an output list is generated with the end item listed as the primary item.

You can change this status to *Firmed*, *Released*, or *Canceled*.

This field value does not apply to planned production.

- *Firmed*: A firmed production ID or production schedule has a quantity, start date, and due date, but the BOM and routing are frozen and the component and operation lists exist. In addition, the output list also exists and can be changed. You cannot generate a picking plan for a firmed order.

You can change this status to *Released* or *Canceled* only.

- *In Process*: When you have recorded production transactions such as issuing or consuming components and recording completions, scrap, or actual hours, the system automatically changes the production status to *In Process*.

You can change this status to *Canceled* only.

This field value does not apply to planned production.

- *Released*: Production has a component list, an operation list, and an output, all of which can be modified. Additionally, each operation's start date, due date, and time are determined. Once released, changing a production ID can result in the deletion of the existing component list and operation list. The lists are then re-added, based on the new information associated with the production ID.

You can change this status to *Canceled* only.

This field value does not apply to planned production.

Production Area

Displays the production area where the process identifier (PID) is currently scheduled to be completed.

	This field does not appear on the Planned Production component.
BOM Code	Displays the BOM used to generate the initial component list for the production order.
Routing Code	Displays the routing identifier used to generate the initial operation list for the production order.
Reference Routing Item	Displays the item whose routing is used to manufacture the end item. Each assembly item may have its own unique primary and alternate routings or reference another item's primary and alternate routings.
Start Date/Time and End Date/Time	Displays the beginning and completion dates and times for the production. You can reschedule the start and end dates.
	<hr/> Note: If you change the production start or end date, the system must reschedule all of the operations. <hr/>
Start Quantity	Displays the quantity of the end item to be started in the production process. You can change the production start or end quantity.
Original Start Quantity and Original End Quantity	Displays the original start and end amounts for the production.
End Quantity	Displays the quantity of the end item that is expected at the end of production. It is adjusted for scrap and yield.
Completed Quantity	Indicates whether assemblies have been completed to stock, routed to another WIP location, or issued directly to another production ID.
	This field does not appear on the Planned Production component.
Scrapped Qty (scrapped quantity)	Displays the number of assemblies that have been scrapped in the process.
	This field does not appear on the Planned Production component.
Priority Rank	The system formats production priority rank based on the highest priority demand to which the production order or planned production order provides supply.
Frozen	Select to change the order to frozen; the system does not reschedule or cancel frozen production orders during the solver process.
Frozen Substitutes	Select to prevent the solvers from suggesting substitutes for this production or planned production order.

Include Quantity

Select to include the production order in all of the planning functions. The system populates this field by default.

This option enables you to load an order in PeopleSoft Supply Planning and ignore the order during simulations.

If you do not include the quantity, the production order appears on the corresponding maintenance page only; the order does not appear on workbenches or reports and is ignored by solvers.

Approved

Select to approve an order manually. The system sends the production order back to the transaction system as an approved order. The production order bypasses the approval logic in the Post Updates process when committing the plan.

Production - Operations Page

Use the Production - Operations page (PL_PRD_OPERATIONS) to review and maintain operation details and attributes for production orders.

Navigation

Supply Planning > Refine Plan > Production Control > Production

Operation Summary

Select the Operation Summary tab.

Planning Start Date/Time

Displays the current date PeopleSoft Supply Planning intends to begin the operation.

Note: If you change the operation date and time, the system must reschedule all of the operations and production header date and times.

Planning End Date/Time

Displays the current date PeopleSoft Supply Planning intends to finish the operation.

Note: If you change the operation date and time, the system must reschedule all of the operations and production header date and times.

Ignore Capacity

Select to ignore the operation when consuming capacity against the work center.

Assembly Starts

Displays the number of assemblies started for the operation.

Expected Completions

Displays the number of assemblies expected to complete at the corresponding operation based on yield for the operation.

Operation Yield % (operation yield percentage)

Displays a percent of the quantity of goods expected to complete the production process.

PeopleSoft Supply Planning considers operation yield to increment the supply by the expected loss to meet demand at the completion of the manufacturing process.

Details

Select the Details tab.

Quantity Completed and Through	Displays the number of assemblies that completed the operation successfully.
Quantity Scrapped	Displays the number of assemblies that were scrapped at the operation.
Operation Completed	Select to indicate that the operation is complete.
Original Start Date/Time and Original End Date/Time	Display the originally scheduled start and end dates and times for the operation.

Note: The Details tab does not appear on the Planned Production component.

Attributes

Select the Attributes tab.

Continuous	Select to complete the operation in a single run with no down time. For example, suppose that a plant operates Monday through Friday, this operation cannot start Friday afternoon and complete the following Monday.
Subcontracted	Select to subcontract the operation.

Production - Resources Page

Use the Production - Resources page (PL_PRD_RESRC) to review the machines, crews, and tools used by the production ID.

You can include this information on the Detail Resource report.

Navigation

Supply Planning > Refine Plan > Production Control > Production

Crew Size	Displays the number of people in a given crew for the operation
Machine Resources	Displays the number of machines used at the operation
Resource Type	Displays the type of resource used. Valid resources are primary or alternate machine, crew, or tool.
Crew/Machine/Tool	Displays the machine, crew, or tool code, as well as the description.

Status	Displays the availability of a resource for this work center.
Quantity Used	Displays the number of tools used at the operation. This option applies to tools only.

Production - Times Page

Use the Production - Times page (PL_PRD_TIMES) to review and maintain operation time details for production orders.

Navigation

Supply Planning > Refine Plan > Production Control > Production

Type and Resource Type	Displays a value that appears by default from the routing information. Values are: <i>Setup</i> , <i>Fixed</i> , <i>Run</i> , <i>Post Production</i> , and <i>In Transit</i> .
Operation Time	Used in conjunction with the time unit, defines the amount of time to complete one unit.
Time Unit	Displays the unit of time for the corresponding operation time. For example, suppose that 5 appears in the Operation Time field, and <i>Days</i> appears in the Time Unit field, then the operation completes one unit every five days. The system determines the number of hours in a day by the work center's average daily hours, which are defined on the Work Center Definition page.
Operation Rate	Used in conjunction with the rate unit, defines the rate at which operations are completed.
Rate Unit	Displays the unit of time for the corresponding operation rate. For example, suppose that 3 appears in the Operation Rate field, and <i>Units/Day</i> appears in the Rate Unit field, the operation completes three units every day.
Include Setup	<p>Select to indicate that the system considers setup in the operation lead time calculation. If you elected to include setup, the setup time is factored into the task or operation's lead time. The system always considers setup in the lead time calculation of the first operation, if setup is specified, regardless of the check box setting. This option applies only to planning labor setup and planning machine setup operation types.</p> <p>If this option is not selected, setup can begin prior to any production units arriving at the work center. The system assumes that setup can occur at any time after the start of production and does not include it as part of the item's lead time, except at the first operation.</p>

Production - Components Page

Use the Production - Components page (PL_PRD_COMPONENTS) to review and maintain production order component details.

Navigation

Supply Planning > Refine Plan > Production Control > Production

Common Information

Component ID	Indicates the name of the component being used in the corresponding operation sequence.
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Note: Components cannot be substituted once an issue or scrap has occurred. Substitutions always occur for the original component and not the current component.

Component Summary

Select the Component Summary tab.

Original Component ID	Displays the original component from the BOM that the system uses to create the component list. When the component ID and the original component ID do not share the same value, a substitution has occurred.
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Scheduled Quantity	Displays the number of assemblies scheduled for production for the corresponding operation sequence.
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Remaining Quantity	Displays the outstanding demand for the component at a particular operation sequence.
---------------------------	---

Note: Remaining quantity applies only to existing production orders and schedules. For planned production, the scheduled quantity and remaining quantity are the same.

For all orders other than orders in process, the system calculates outstanding demand using the CURR_SCHED_QTY.

For orders that are in process orders:

- If the issue method is *KIT* or if the quantity code is *ORD*, the system calculates these outstanding demand codes:
 - Sets the demand quantity equal to CURR_SCHED_QTY.
 - Calculates the expected yield for the component using this equation: $\text{CURR_SCHED_QTY} * (1 - \text{YIELD}/100)$
 - Compares the result against the YIELD_QTY.

Subtracts the smaller of the two from the demand quantity.

- Subtracts the `ISSUE_QTY` from the demand quantity.
- Compares the demand quantity against the sum of `PEND_CONSUME_QTY` + `PEND_LOSS_QTY`.

If the sum of the pending quantities is greater than the demand quantity, the system uses the pending quantities as the demand quantity.

- Otherwise, the system calculates the outstanding demand quantity as: $(\text{NEW_PRDN_QTY} - \text{QTY_COMP_AND_THRU} - \text{QTY_SCRAPPED}) * \text{SF_QTY_PER} * (100 / \text{YIELD}) + \text{PEND_CONSUME_QTY} + \text{PEND_LOSS_QTY}$

Note: The system determines `QTY_COMP_AND_THRU` and `QTY_SCRAPPED` by analyzing the operation list associated with the component list. If the operation sequence of the component is equal to zero, or if the operation sequence is not a valid operation list sequence, the system obtains these two quantities from the first operation for the assembly item. If the operation sequence of the component has a valid operation list sequence, the system obtains `QTY_COMP_AND_THRU` from that operation list sequence. In this case, `QTY_SCRAPPED` is equal to the sum of `QTY_SCRAPPED` from all prior operations. If no operation lists exist for the production ID, the system uses quantities from the production ID header. The system sets `QTY_COMP_AND_THRU` equal to `COMPLETED_QTY` and sets `QTY_SCRAPPED` equal to `SCRAP_QTY`.

Quantities

Select the Quantities tab.

Quantity

Displays the number of components required based on per assembly or per order.

Per

Displays the component requirements, expressed as an amount per assembly with a unit of 1 or per order, an amount regardless of the order size.

Yield

Displays the expected percentage of usable components in a batch of components issued to production.

Issue Quantity

For components using the issue or replenishment material issue method, displays the quantity consumed from the WIP location for the component and is charged to work in process. For components using the kit method, this is the quantity issued directly to the production ID.

Yield Loss Quantity

Displays the quantity scrapped during the end item process and consumed from the WIP location.

Pending Issue Quantity

Displays the quantity used based on the quantity completed at the operation multiplied by the quantity per assembly. If the component's quantity is expressed as per order, this is the per order quantity. The per order quantity is completely consumed at the first backflush. This quantity has not yet been consumed from the WIP location due to material shortages.

Pending Yield Loss Quantity

Displays the quantity of components scrapped during the end item process but not yet consumed from the WIP location due to material shortages.

Note: Substitutes require the system to recalculate the quantity per and current scheduled quantity.

Note: The Quantities tab does not appear on the Planned Production component. However, some fields on this tab appear on the Planned Production Component Summary tab.

Details

Select the Details tab.

Component Issue Method

Indicates how the end item's components are issued for production. Values are:

- *Issue:* Use picking plans to translate requested stock into material picking instructions for stockroom processing.
- *Kit Method:* Issue material directly to a production ID rather than to the WIP location, thus preventing other orders from using the material.
- *Replenish Method:* Use when you want only a fixed quantity to sit on the shop floor (especially when space is a constraint) or when there are items that do not need to be allocated to specific orders or to a production run.
- *Component Issue:* The system looks at the component's issue method defined at the business unit and item level to determine how to issue the component to the shop floor.

Note: The Details tab does not appear on the Planned Production component.

Production - Outputs Page

Use the Production - Outputs page (PL_PRD_OUTPUTS) to review and maintain production order output details.

Navigation

Supply Planning > Refine Plan > Production Control > Production

Common Information

Output Type

Displays the type of output associated with the BOM. Values include *Primary*, *Co-product*, *Recycle*, *Teardown*, and *Waste*.

- *Primary*: If you have only one output on this BOM, then it is the primary output.
- *Co-product*: An item that is produced as part of the manufacturing process along with the primary output. It shares the cost of the process, and there may be independent demand in PeopleSoft Supply Planning for this item. Orange juice and orange concentrate are examples of co-products.
- *Waste*: A by-product can be a waste product that needs to be disposed.

Recycle: A by-product that can be used as an input to other processes. The by-product is incidental to the process and has a relief (negative) cost for recycle by-products or a disposal (positive) cost for waste by-products.

Waste by-products might not have cost associated with them. Usually, there is no independent demand for by-products. Orange pulp is an example of recycle by-products.

Output Item

The item must be an existing, inventory, and standard costed item. Output items cannot be floor stock or expense items.

Output Summary Tab

Select the Output Summary tab.

Remaining Quantity

Outstanding supply for the co-product and by-product. Calculated as Scheduled Quantity - Completed Quantity.

Resource % (resource percentage)

Displays the resource allocation percentage. This field indicates the percent of the BOM quantity each co-product represents.

It is used during completions to determine what percentage of the components should be consumed for each co-product and primary item.

This field does not appear on the Planned Production component.

Details

Select the Details tab.

Per

Displays the component requirements, expressed as an amount per assembly with a unit of 1, or per order, an amount regardless of the order size.

Scheduled Quantity

Displays the quantity expected from the production reduced by production scrap.

Completed Quantity

Displays the number of assemblies completed.

This field does not appear on the Planned Production component.

Inventory Pegging

Select the Inventory Pegging tab.

Peg Status

Displays the pegging status of the line item.

- *Unpegged:* This line item does not have pegged demand.
- *Open:* This line item is pegged to demand that has yet to be fulfilled.
- *Completed:* This line item is pegged to demand that has been fulfilled.

Peg Details

Click the link to display the pegged demand information. This column will only be available if the Peg Status is Open or Completed.

Refining Purchasing Details

This topic discusses how to review and maintain POs.

Pages Used to Refine Purchasing Details

Page Name	Definition Name	Usage
<u>Purchase Orders Page</u>	PL_PO_HDR	Review and maintain parameters for POs, such as the purchase options, suppliers, and PO line schedules.
<u>Planned Purchase - Orders Page</u>	PL_PLN_PO	Review and maintain planned POs. You can add a new order for required materials, and change the quantities and delivery dates to meet forecasted demand.
<u>Closed Purchase Order Page</u>	PL_PO_HDR_C	Review closed POs.

Common Elements Used in This Section

Approved	Select to approve the PO manually. The system sends the PO back to the transaction system as an approved order and bypasses the approval logic in the Post Updates process.
Configuration Code	A non-active field that is related to a deprecated product.
Frozen	Select to change the status of the purchase order to frozen; solvers do not reschedule or cancel frozen purchase orders.
Include Quantity	<p>Select to include the PO in all of the planning functions. The system populates this field by default.</p> <p>This option enables you to load an order in PeopleSoft Supply Planning and ignore the order during simulations. If you do not include purchase quantities, the order appears on the corresponding maintenance page only; the order does not appear on workbenches or reports and is ignored by solvers.</p>

Purchase Orders Page

Use the Purchase Orders page (PL_PO_HDR) to review and maintain parameters for POs, such as the purchase options, suppliers, and PO line schedules.

Navigation

Supply Planning > Refine Plan > Purchasing > Purchase Orders

Note: You cannot add or delete a PO, PO line, schedule, or distribution on this page.

Common Information

PO Date (purchase order date)	Displays the date that you created the PO.
PO Type (purchase order type)	Displays the type of PO. This is used for informational purposes.
PO Status (purchase order status)	Displays the status of the entire PO. Values include: <i>Initial</i> , <i>Open</i> , <i>Pending Approval</i> , <i>Approved</i> , <i>Dispatched</i> , <i>Canceled</i> , and <i>Complete</i> .
Location	Displays the primary supplier location.
Buyer	Displays the name of the buyer on the PO.
Line	Displays the PO line. PO lines contain information such as the item ID, item description, category, and quantity. You can access schedules and distributions through the PO line.
Schedule	Every PO line has one or more due dates and external delivery locations carried on a schedule. In PeopleSoft Purchasing, you create a schedule for each unique delivery address and due date.

Distribution Line

Distribution lines contain information about how the item quantity charges and internal delivery locations. Distributions also contain interface information for PeopleSoft Inventory, Project Costing, Order Management, and Asset Management. You can have more than one distribution for each schedule.

Schedules

Select the Schedules tab.

Due Date/Time

Displays the date that the transaction system expects to receive the distribution.

Planning Due Date/Time

Displays the current scheduled date on which planning intends to receive the distribution.

Lead Time

Displays the number of days it takes to get inventory from the supplier.

Release Date/Time

Displays the date that you must dispatch the PO to get the receipt by the due date and time.

Quantities

Select the Quantities tab.

Quantity Base

Represents the initial quantity specified on the PO in the item's standard UOM. This field is required.

Received Base

Displays the quantity received and put away into PeopleSoft Inventory.

Returned Base

Displays the quantity returned to the supplier for replacement.

Remaining Quantity

Displays the outstanding supply due from the supplier. The system calculates this value as round down (quantity base * purchase yield) received base + returned base.

Details

Select the Details tab.

Status

You can change the PO line status to *Active* or *Canceled*.

Inventory Pegging

Select the Inventory Pegging tab.

Peg Status

Displays the pegging status of the line item.

- *Unpegged*: This line item does not have pegged demand.

- *Open*: This line item is pegged to demand that has yet to be fulfilled.
- *Completed*: This line item is pegged to demand that has been fulfilled.

Peg Details

Click the link to display the pegged demand information. This column will only be available if the Peg Status is Open or Completed.

Planned Purchase - Orders Page

Use the Planned Purchase - Orders page

Navigation

Supply Planning >Refine Plan >, Purchasing >Planned Purchase Orders

Planning Sequence Number

Represents the numbering scheme that the system uses to keep planned orders in the Planning Instance table synchronous with those in the transaction system.

Each time that you run the Load Planning instance processing regeneration mode, the process initializes the next available planning sequence number to zero. The process resequences all of the planned orders that exist in the transaction system when inserting them into the Planning Instance table. After inserting all of the orders into the table, the process updates the next available planning sequence number on the Planning Instance table to equal the last planning sequence number used plus one.

As the system inserts new planned orders in the planning instance, the system increments the planning sequence number for each new record.

Status

Displays the current status for the planned PO. Values are:

- *Canceled*: PeopleSoft Supply Planning does not pass canceled orders back to the transaction system.
- *Planned*: The system deletes all of the planned POs when you run the Material and Capacity Feasible solver in regenerative mode.
- *Firmed*: The system does not delete planned orders with a status of *Firmed* when you run the Material and Capacity Feasible solver in regenerative mode but will cancel them. Solvers can reschedule a firmed order provided that the order is not frozen.

Due Date/Time

Represents the day that you expect to receive the inventory.

Release Date/Time	Displays the day that you must dispatch the order to receive the inventory on the due date and time.
Lead Time	Displays the number of days that it takes to get inventory from the supplier.
Quantity	Represents the initial PO quantity. This field is required.
Remaining Quantity	Represents the outstanding supply due from the supplier. The system calculates this value as round down (quantity * purchase yield).
Spot Buy	Designates if the item is a spot buy item, which can be sourced by soliciting bids for a required quantity and date.

Closed Purchase Order Page

Use the Closed Purchase Order page (PL_PO_HDR_C) to review closed POs.

Navigation

Supply Planning > Refine Plan > Purchasing > Closed Purchase Order

The Closed Purchase Order page enables you to view the details of closed purchase orders. You can use this information to calculate supplier shipments when considering supplier capacity. For example, if supplier capacity for an item is 100 for the month of January, you can view the Closed Purchase Order page to take into account a closed PO for a quantity of 25 that you received during the first week of January.

Performing Mass Maintenance

This topic provides an overview of mass maintenance and mass maintenance action types.

Pages Used to Perform Mass Maintenance

Page Name	Definition Name	Usage
<u>Mass Maintenance - Header Page</u>	PL_PI_MSMNT_REQ1	Define mass maintenance header information and item-related selection criteria.
<u>Mass Maintenance - Selection Detail Page</u>	PL_PI_MSMNT_REQ2	Define mass maintenance step information and transaction-related selection criteria.

Understanding Mass Maintenance

The Mass Maintenance component enables you to:

- Modify multiple objects at a time.

For example, you can freeze all of the production orders for an item.

- Retain maintenance tasks that are repeated for each planning cycle.

For example, you can define and retain a maintenance task to ignore all of the overdue supplies.

- Make changes during planning cycle processing.

The Mass Maintenance functionality provides run control in the planning environment to define the mass maintenance steps. You can update all of the supply and demand transactions, set scalar values in fields, reschedule demands and supplies, change sourcing options, and consolidate multiple transactions.

Mass Maintenance Definition

Define the mass maintenance steps for planning instance data on a run control record. The maintenance definition is independent of planning instance, enabling you to change the planning instance on a run control and retain the associated mass maintenance steps.

A mass maintenance run control consists of:

- A header section that describes the overall function of the mass maintenance and the attributes common to all of the steps.
- The steps associated with the mass maintenance.

Each step may only operate on one transaction type. Each step contains the selection criteria for records to be maintained, as well as the actions that the system performs on the records that meet the selection criteria.

Mass Maintenance Reporting

You can generate the Mass Maintenance report (PLS7000) that summarizes, for each step, the selection criteria, the number of records that meet the selection criteria, and the records impacted by the maintenance step. Additionally, you can generate this report to determine potential outcomes without executing the setup, and use the report as an audit trail after execution.

Mass Maintenance Steps

To define a maintenance step, define the supply or demand transaction type on which you want the system to perform the actions. Each mass maintenance step applies to one transaction type only. The transaction types supported are:

- Production.
- Planned production.
- POs.
- Planned POs.
- Transfers.
- Planned transfers.
- MSRs.

- Forecasts (forecast demand only).
- Extra demand.
- Sales orders.
- Quotes.
- Buying agreements.

Next, define the records that you want the system to select for the specified transaction type. Lastly, define the maintenance actions that you want the system to perform on the selected records.

Understanding Mass Maintenance Action Types

Four types of mass maintenance actions are available in the Mass Maintenance component. You can:

- Set scalar values in fields.
- Reschedule demands and supplies.
- Change sourcing options.
- Consolidate multiple transactions.

The actions available to you in the Mass Maintenance - Header page determine which values appear in the Transaction Type field. This table lists valid combinations supported by mass maintenance:

Transaction Type	Set Value	Reschedule	Sourcing	Consolidate
Production	X	X		
Planned Production	X	X	X	X
POs	X	X		
Planned Purchase	X	X	X	X
Orders Transfers	X	X		
Planned Transfers	X	X	X	X
Material Stock	X			
Requests Forecasts	X			
Extra Demand Sales	X			
Orders Quotes	X			
Buying Agreements	X			

Set Value Action Types

Set value actions update fields on a transaction to a scalar value.

Reschedule Action Types

Reschedule actions and reschedule supply transactions to occur on a new date. These action types can reschedule forward from a new start date or backwards from a new end date.

Note: Reschedule action types ignore the Frozen option, and do not check for material and capacity violations.

Consider these options when using reschedule action types with these transaction types:

Production Orders and Planned Production Orders	Reschedule actions adjust a target date to a valid production date. If the start date is invalid, the system reschedules from the first valid production date after the supplied date. If the end date is invalid, the system reschedules backwards at the first valid production date before the supplied date.
Purchase Orders and Planned Purchase Orders	<p>Reschedule actions use the target date as the new release date when forward scheduling and ensure the new due date time is a valid receiving date according to the receiving calendar.</p> <p>When backward scheduling, reschedule actions use the target date as the due date and do not ensure that the due date time is a valid receiving day. These actions assume the target due date is the expected actual receipt date.</p>
Transfer Orders and Planned Transfer Orders	<p>When forward scheduling from the scheduled ship date (PL_SCHED_DTTM), reschedule actions ensure the new arrival date time is a valid receiving date according to the receiving calendar. These actions do not validate the ship date.</p> <p>When backward scheduling, reschedule actions do not ensure that the arrival date time is a valid receiving day. These action types assume that the arrival date that you enter is the expected actual receipt date. Reschedule actions do ensure that the ship date is a valid shipping date.</p>

Sourcing Action Types

Sourcing actions change the sourcing supply option on selected transactions. These actions use the new sourcing option to reschedule the transaction backwards from the end date.

Sourcing actions can change yield values. A change in yield can change the start quantity, any component requirements, and any by-product output quantities.

Sourcing actions respect order modifiers. New quantities must be a valid interval equal to or less than the maximum order size. The system creates multiple orders if the original transaction quantity exceeds the maximum order size.

Note: Sourcing actions do not check for material and capacity violations.

Consider these options when using sourcing action types with these transaction types:

Planned Production Orders

If you change the sourcing option on planned production, the system requires you to enter a new BOM code and routing code on the Maintenance Step definition.

Modifying a sourcing option is equivalent to deleting an existing production order, creating a new production order for the same output quantity and end date, and using new BOM and routing codes.

Sourcing actions apply only to planned production orders where the new business unit, item code, BOM code, routing code, and production type combination is a valid production option that exists on the PL_PROD_OPT table.

Planned Purchase Orders

If you change the sourcing option on a planned PO, the system requires you to enter a new supplier SetID, supplier ID, and supplier location.

Modifying a sourcing option is equivalent to deleting an existing PO, creating a new PO for the same output quantity and due date, and using new supplier SetID, supplier ID, and supplier location codes.

Sourcing actions apply only to planned POs where the new business unit, item code, supplier SetID, supplier ID, and supplier location combination is a valid purchase option that exists on the PL_PURCHASE_OPT table.

Planned Transfer Orders

If you change the sourcing option on a planned transfer order, the system requires you to enter a new source business unit and ship type ID.

Modifying a sourcing option is equivalent to deleting an existing transfer order, creating a new transfer order for the same output quantity and arrival date, and using source business unit and ship type ID codes.

Sourcing actions apply to planned transfer orders in two different situations:

- Where the business unit, item code, source business unit, and ship type ID combination is a valid item transfer option that exists on the PL_TRANS_IT_OPT table.
- Where the business unit and item code combination has a planned by attribute defined as *Distribution*. In this scenario, the business unit, source business unit, and ship type ID combination must be a valid generic transfer option that exists on the PL_TRANS_OPT table.

Consolidate Action Types

Consolidate actions and group multiple planned supply transactions according to business unit, item, sourcing option, and order status into a single transaction with an aggregated quantity.

These actions can reschedule the consolidated transaction forward from a new start date or backwards from a new end date.

Consolidation actions respect order modifiers. New quantities must be a valid interval equal to or less than the maximum order size. The system creates multiple orders if the consolidated total exceeds the maximum order size.

Note: Consolidation action types ignore the Frozen option, and do not check for material and capacity violations. You cannot consolidate planned transactions for configurable items.

Mass Maintenance - Header Page

Use the Mass Maintenance - Header page (PL_PI_MSMNT_REQ1) to define mass maintenance header information and item-related selection criteria.

Navigation

Supply Planning > Refine Plan > Mass Maintenance

Description	Enter a description of the mass maintenance. A description is required.
Planning Instance	The maintenance definition is independent of planning instance. You can change the planning instance for a run control and retain the associated mass maintenance steps.
Run	Click to initiate the Mass Maintenance process (PL_PI_MSMNT) for the corresponding transaction type.
Start Planning Engine	Click to start the planning engine for the corresponding planning instance.
Execute Maintenance Actions	Select to execute the maintenance steps on this run control. If you do not select this option, the system does not execute the steps on this run control when you run the Mass Maintenance Application Engine process (PL_PI_MSMNT).
	<hr/> <p>Note: The data that the Mass Maintenance Application Engine process writes to the report tables remains in the report tables until you rerun the Mass Maintenance Application Engine process for the corresponding run control. To refresh the data in the report tables, select the Execute Maintenance Actions option and the Run Maintenance Report option, and run the Mass Maintenance Application Engine process.</p> <hr/>
Run Maintenance Report	<p>Select to clear all previous report information from report tables and refresh the tables with the information on the run control, steps, and affected transactions for each step of the current run.</p> <p>If you do not select this option, all information from a prior run of the same run control remains in the report tables, and the system writes no new information to the tables when you run the Mass Maintenance Application Engine process.</p>

Note: If you elect to run the Mass Maintenance report (PLS7000) prior to running the Mass Maintenance Application Engine process on the Process Scheduler Request page, the report results might be incomplete. For example, if you freeze plan production in step 1, and then select frozen plan production in step 2, then step 1 must execute before step 2 can accurately depict the changes. If you are running in report mode only, this execution does not occur, and the reported list of affected transactions for step 2 is incomplete.

Maintenance Steps

Step

Enter a step number. Each step operates on one transaction type only.

Each step has two main sections:

- The selection criteria for records to be maintained.
- The actions to be taken on the records that meet the selection criteria.

Description

Enter a description for the corresponding step.

Action

Select the action type that you want to perform on the transaction. The value that you select here determines the values that appear in the Transaction Type field.

Transaction Type

Select the supply or demand transaction type on which the system performs the action that you selected in the Action field. Each mass maintenance step applies to one transaction type only.

The values available in this field are determined by the value that you selected in the Action field.

Date/Days Offset Selection

When specifying values for date fields, you can elect to state an explicit date or a stated number of days offset from the current date associated with planning instance.

Item Selection Criteria

Define item selection criteria for each mass maintenance step that you include in the run control. Filter criteria on the Header page consists of fields from the item on the transaction.

Each field has a corresponding operator column or values column. Values (for example, *Both*, *Yes*, and *No*) appear when a field contains a finite set of values.

Mass Maintenance - Selection Detail Page

Use the Mass Maintenance - Selection Detail page (PL_PI_MSMNT_REQ2) to define mass maintenance step information and transaction-related selection criteria.

Navigation

Supply Planning > Refine Plan > Mass Maintenance

Maintenance Steps

The fields that appear in this group box are the same fields you defined in the Maintenance Step group box on the Header page. You can overwrite those values here.

Selection Criteria

Define item selection criteria for each mass maintenance step that you include in the run control. Filter criteria on the Selection details page consists of fields specific to the transaction type. For example, if you selected *Forecasts* as the transaction type, the system displays forecast-related fields in the Selection Criteria group box, such as Forecast Family, Forecast Date, and Priority Rank.

Committing PeopleSoft Supply Planning Updates

Understanding PeopleSoft Supply Planning Planned Order Numbering

This section discusses the numbering schemes that the system uses to keep planned orders in the planning instance synchronous with numbering schemes in the transaction system.

PeopleSoft Supply Planning retains two sets of order numbers for each planned order. The first number is unique for a planning instance. The second number is unique within the transaction system. Both numbers reside on the transaction system table and planning instance table, one number is a key, the other number is a reference.

Planning Instance Sequence Number

When you run the Load Planning Instance process (PL_LOAD_OPT) with a run type defined as *Regenerative*, the process sets the planned sequence number equal to the transaction system sequence number when it inserts these orders into the planning instance tables.

After the Load Planning Instance process inserts all of the orders into the planning instance tables, it updates the next available planning sequence number on the Planning Instance table to equal the last planning sequence number used, plus one, and increments this number each time that you add new planned orders to the planning instance tables.

Transaction System Sequence Number

In the planning instance tables, the system populates the transaction sequence number with the sequence number from the transaction system table record. The system populates this field with a zero for new orders created in the planning instance. Because multiple planning instances can post data back to the transaction system, it is possible that the same planning sequence number can exist in more than one planning instance. To keep orders unique in the transaction system, PeopleSoft Supply Planning also assigns a transaction sequence number.

When you run the Post Updates process, the transaction system stores the next available transaction sequence number by order type on the Installation - Planning table (INSTALLATION_PL). Existing planned orders retain the transaction sequence number assigned when they were first added into the transaction system.

Example 1: Regeneration

This example demonstrates how the system assigns order numbers for a simple case of regeneration only.

1. You plan for a group of items for the first time.

No planned orders exist in the transaction system.

2. You run the Load Planning Instance process with the run type defined as *Regenerative*, using these values:
 - Planning Instance = *MRP*.
 - Business Unit = *US008*.
 - Next Available Planning Sequence Number = *1*.
 - Transaction System Next Available Transaction Sequence Number = *1*.
3. You run a planning solver, which adds two planned orders:

Planning Instance Table			
Planning Instance	Business Unit	Planning Sequence Number	Transaction Sequence Number
MRP	US008	1	0
MRP	US008	2	0

These are the next available sequence numbers in the Planning Instance table:

- Planning Instance Next Available Planning Sequence Number = *3*.
 - Transaction System Next Available Transaction Sequence Number = *1*.
4. You commit the planning data, including the two planned orders, back to the transaction system.

The new planned orders do not have a transaction sequence number, so the system assigns each planned order a transaction sequence number:

Transaction System Table			
Business Unit	Transaction Sequence Number	Planning Instance	Planning Sequence Number
US008	1	MRP	1
US008	2	MRP	2

These are the next available sequence numbers in the transaction system table:

- Planning Instance Next Available Planning Sequence Number = *3*.
 - Transaction System Next Available Transaction Sequence Number = *3*.
5. You run Load Planning Instance process again with the run type defined as *Regenerative*.

Planning Instance Table			
Planning Instance	Business Unit	Planning Sequence Number	Transaction Sequence Number
MRP	US008	1	1
MRP	US008	2	2

These are the next available sequence numbers in the Planning Instance table:

- Planning Instance Next Available Planning Sequence Number = 3.
 - Transaction System Next Available Transaction Sequence Number = 3.
6. You commit the planning data, including the two planned orders, back to the transaction system immediately after the Load Planning Instance process.

Because each planned order has an assigned transaction sequence number, the system assigns no new numbers:

Transaction System Table			
Business Unit	Transaction Sequence Number	Planning Instance	Planning Sequence Number
US008	1	MRP	1
US008	2	MRP	2

These are the next available sequence numbers in the transaction system table:

- Planning Instance Next Available Planning Sequence Number = 3.
- Transaction System Next Available Transaction Sequence Number = 3.

Example 2: Multiple Problem Instances, Exclusive Items, and Regeneration Only

This example demonstrates the order numbering assignment during a more complex scenario, with multiple planning instances, exclusive items, and a run type defined as *Regenerative*.

1. You plan for a group of items for the first time.

No planned orders exist in the transaction system.

2. You run the Load Planning Instance process with the run type defined as *Regenerative*, and use these values:
 - Planning Instance = *GROUP1*.

- Business Unit = *US008*.
- Planning Instance Next Available Planning Sequence Number = *1*.
- Transaction System Next Available Transaction Sequence Number = *1*.

3. You run a planning solver, which adds two planned orders:

Planning Instance Table			
Planning Instance	Business Unit	Planning Sequence Number	Transaction Sequence Number
GROUP1	US008	1	0
GROUP1	US008	2	0

These are the next available sequence numbers in the Planning Instance table:

- Planning Instance GROUP1 Next Available Planning Sequence Number = *3*.
- Transaction System Next Available Transaction Sequence Number = *1*.

4. You plan for a second group of items for the first time.

No planned orders exist in the transaction system.

5. You run the Load Planning Instance process with the run type defined as *Regenerative*, using these values:

- Planning Instance = *GROUP2*.
- Business Unit = *US008*.
- Planning Instance Next Available Planning Sequence Number = *1*.
- Transaction System Next Available Transaction Sequence Number = *1*.

6. You run a solver, which adds three planned orders:

Planning Instance Table			
Planning Instance	Business Unit	Planning Sequence Number	Transaction Sequence Number
GROUP1	US008	1	0
GROUP1	US008	2	0
GROUP2	US008	1	0
GROUP2	US008	2	0

Planning Instance Table			
Planning Instance	Business Unit	Planning Sequence Number	Transaction Sequence Number
GROUP2	US008	3	0

These are the next available sequence numbers in the Planning Instance table:

- Planning Instance GROUP2 Next Available Planning Sequence Number = 4.
- Transaction System Next Available Transaction Sequence Number = 1.

7. You commit the planning data for planning instance GROUP1, including the two planned orders, back to the transaction system.

The new planned orders do not have a transaction sequence number, so the system assigns each planned order a transaction sequence number:

Transaction System Table			
Business Unit	Transaction Sequence Number	Planning Instance	Planning Sequence Number
US008	1	GROUP1	1
US008	2	GROUP1	2

The transaction system's next available Transaction Sequence Number is now = 3.

8. You commit the planning data for planning instance GROUP2, including the three planned orders, back to the transaction system.

The new planned orders do not have a transaction sequence number, so the system assigns each planned order a transaction sequence number:

Transaction System Table			
Business Unit	Transaction Sequence Number	Planning Instance	Planning Sequence Number
US008	1	GROUP1	1
US008	2	GROUP1	2
US008	3	GROUP2	1
US008	4	GROUP2	2
US008	5	GROUP2	3

The transaction system's next available Transaction Sequence Number is now = 6.

9. You create a new planning instance that represents all of the items.
10. You run the Load Planning Instance process with the run type defined as *Regenerative*, using these values:
 - Planning Instance = *ALLITEMS*.
 - Business Unit = *US008*.
 - Planning Instance Next Available Planning Sequence Number = 1.
 - Transaction System Next Available Transaction Sequence Number = 6.
11. You run the Load Planning Instance process with the run type defined as *Regenerative*, which produces these results:

Planning Instance Table			
Planning Instance	Business Unit	Planning Sequence Number	Transaction Sequence Number
GROUP1	US008	1	0
GROUP1	US008	2	0
GROUP2	US008	1	0
GROUP2	US008	2	0
GROUP2	US008	3	0
ALLITEMS	US008	1	1
ALLITEMS	US008	2	2
ALLITEMS	US008	3	3
ALLITEMS	US008	4	4
ALLITEMS	US008	5	5

These are the next available sequence numbers in the Planning Instance table:

- Planning Instance ALLITEMS next available Planning Sequence Number = 6.
 - Transaction system next available Transaction Sequence Number = 6.
12. You freeze all of the orders in planning instance ALLITEMS, run a solver, and assume one additional order is added:

Planning Instance Table			
Planning Instance	Business Unit	Planning Sequence Number	Transaction Sequence Number
GROUP1	US008	1	0
GROUP1	US008	2	0
GROUP2	US008	1	0
GROUP2	US008	2	0
GROUP2	US008	3	0
ALLITEMS	US008	1	1
ALLITEMS	US008	2	2
ALLITEMS	US008	3	3
ALLITEMS	US008	4	4
ALLITEMS	US008	5	5
ALLITEMS	US008	6	0

These are the next available sequence numbers in the Planning Instance table:

- Planning Instance *ALLITEMS* next available Planning Sequence Number = 7.
- Transaction system next available Transaction Sequence Number = 6.

13. You import the planning data for planning instance, *ALLITEMS*, back to the transaction system.

The *ALLITEMS* planning instance represents the items in *GROUP1* and *GROUP2*; therefore, orders exist in this group that also exist in the transaction system. To distinguish between new planned purchase orders (POs) and existing planned POs in the transaction system, the system:

- Deletes from the transaction system—on an item-by-item basis—any planned POs that do not exist in the imported planning instance.
- Updates the transaction system records for existing planned POs with relevant data in the planning instance table records.
- Inserts new planned POs—orders in the planning instance that have a transaction sequence number defined as zero—into the transaction system tables.

In this example, the system has previously assigned the first five orders transaction sequence numbers. The system updates these orders with any relevant changes.

For planned transfer and production orders, the system deletes all of the orders from the transaction system and inserts planned orders into the transaction system tables.

The last order does not have an assigned transaction sequence number. This new order is inserted into the transaction system table and assigned a transaction sequence number from the Installation - Planning table.

Transaction System Table			
Business Unit	Transaction Sequence Number	Planning Instance	Planning Sequence Number
US008	1	ALLITEMS	1
US008	2	ALLITEMS	2
US008	3	ALLITEMS	3
US008	4	ALLITEMS	4
US008	5	ALLITEMS	5
US008	6	ALLITEMS	6

The transaction system's next available Transaction Sequence Number is now = 7.

Example 3: Net Change Example

A limited number of scenarios exist where you import planned order changes into the planning instance with a run type of *Net Change*. These include:

- Converting a planned order into an actual order. The order is deleted from the planning instance.
- Adding a planned PO within PeopleSoft Collaborative Supply Management (PeopleSoft CSM). Orders added by PeopleSoft CSM have a blank planning instance and a planning sequence number defined as zero.
- Changing an existing planned PO within PeopleSoft CSM.

1. In this example, you are working with the data from example 2:

Planning Instance Table			
Planning Instance	Business Unit	Planning Sequence Number	Transaction Sequence Number
GROUP1	US008	1	0
GROUP1	US008	2	0
GROUP2	US008	1	0
GROUP2	US008	2	0

Planning Instance Table			
Planning Instance	Business Unit	Planning Sequence Number	Transaction Sequence Number
GROUP2	US008	3	0
ALLITEMS	US008	1	1
ALLITEMS	US008	2	2
ALLITEMS	US008	3	3
ALLITEMS	US008	4	4
ALLITEMS	US008	5	5
ALLITEMS	US008	6	0

and:

Transaction System Table			
Business Unit	Transaction Sequence Number	Planning Instance	Planning Sequence Number
US008	1	ALLITEMS	1
US008	2	ALLITEMS	2
US008	3	ALLITEMS	3
US008	4	ALLITEMS	4
US008	5	ALLITEMS	5
US008	6	ALLITEMS	6

- You add a planned order in the transaction system:

Transaction System Table			
Business Unit	Transaction Sequence Number	Planning Instance	Planning Sequence Number
US008	1	ALLITEMS	1
US008	2	ALLITEMS	2
US008	3	ALLITEMS	3
US008	4	ALLITEMS	4

Transaction System Table			
Business Unit	Transaction Sequence Number	Planning Instance	Planning Sequence Number
US008	5	ALLITEMS	5
US008	6	ALLITEMS	6
US008	7	Blank	0

The transaction system's next available Transaction Sequence Number is now = 8.

3. You convert transaction sequence numbers 5 and 6 into actual POs and run the Load Planning Instance process with a run type of *Net Change* for problem instance ALLITEMS.

These actions occur:

- The Load Planning Instance process deletes all of the planning orders with a transaction sequence equal to zero.
- The order number ALLITEMS/US008/5 (planning instance/business unit/transaction sequence number) exists in the planning instance table. Therefore, the system deletes planned order ALLITEMS/US008/5 from the planning instance.
- The order number ALLITEMS/US008/ 6 does not exist in the planning instance table. No action occurs.
- The order number ALLITEMS/US008/ 7 does not exist in the planning instance table. In the transaction system, planned order US008/7 does not map to any planning instance order. Therefore, the system adds this new order as ALLITEMS/US008/7.
- Using the same logic for planning instance GROUP1, the system deletes all of the orders from the planning instance and adds transaction sequence numbers 1, 2, 3, 4, and 7; the system sets the next available planning sequence number to 8.
- Using the same logic for planning instance GROUP2, the system deletes all of the orders from the planning instance and adds transaction sequence numbers 1, 2, 3, 4, and 7; the system sets the next available planning sequence number to 8.

Posting PeopleSoft Supply Planning Updates to the Transaction System

After you create a workable plan in PeopleSoft Supply Planning, create the recommendations into the PeopleSoft transactional system using the Post Updates process. There, the recommendations are distributed into the various components as planning updates, where you can review them. You can also select to have updates automatically approved, where applicable.

Page Used to Run the Post Updates Process

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Post Updates Page	PL_POST_REQ	Extract new orders and changes to existing orders from the planning instance. Validate and stage orders for application to the transaction system.

Understanding the Post Updates Process

The Post Updates process enables you to generate PeopleSoft Supply Planning updates for PeopleSoft Order Management, Inventory, Production Management, and Purchasing.

The Post Updates process performs these steps for the specified run control:

1. Locks the business unit for posting planning updates, as indicated by the business unit group associated with the planning instance.

Two posts cannot run concurrently for the same business unit and data type. If the business unit is locked by another process, the system displays an error in the message log.

2. Calculates the item horizons.
3. Processes all of the selected data types.

For each data type, the process:

- a. Selects data for processing.
- b. Initializes the staging and exception tables.
- c. Validates changes.
- d. Approves valid orders.
- e. Updates staging and exception tables.

4. Unlocks the planning instance data type.

Multi-Process Post Update

You can post updates using the Post Updates process (PL_POST) or using the Plan Multi-Process Post job (PL_POSTM), which separates the Post Updates process into several child processes to enable concurrency. Multi-process post updates enables you to use multi-CPU servers or schedule child processes to occur on different servers.

PeopleSoft Supply Planning uses JobSet functionality to enable you to schedule a combination of serial and parallel jobs. When you select the Multi-Process Post Update job on the PeopleSoft Process Scheduler page, the system schedules the processes to run serially or parallel, as needed. If a process fails, the system determines which, if any, subsequent processes it should run. For example, if the Multi-Process Post Update Start process (PL_POST_MPS) process fails, the system does not run subsequent processes. However, if the Post Production Updates process (PL_POST_PR) fails, the system still runs the Post Sales Order Updates process (PL_POST_SO), as the remaining processes in the Multi-Process

Post Update job can run independently of the others. If any single process fails, you can correct the situation, then rerun the Post Updates process for the corrected section.

Calculating Item Horizons

The process calculates these item-specific horizons:

- Planning Time Fence Date = Current Date + Planning Time Fence.
- Action Message Cutoff Date = Current Date + Action Message Cutoff Fence.
- Released Order Fence Date = Current Date + Released Order Fence.
- Firmed Order Fence Date = Current Date + Firmed Order Fence.

Released and firmied dates are used with planned production only.

Selecting Data for Processing

The Post Updates Process considers these options when selecting data for processing:

Planned Order Status

Planned orders must have a status of *Planned* or *Firmed*. Canceled planned POs are posted for supplier scheduled items, if the orders were previously posted to the transaction system.

Actual orders are not subject to this validation.

Actual Order Change

The Post Updates process selects only actual orders that have changed. The process compares the planning instance order against the actual order in the transaction system and selects only those orders where changes occurred.

Planned orders are not subject to this restriction.

Action Message Cutoff Date

If you did not select the Ignore Cutoff option on the Post Updates page, the process selects only those records where the planning-suggested due date or actual due order date are less than or equal to the item's action message cutoff date.

Planned orders do not have an actual order due date.

Initializing Staging and Exception Tables

The Post Updates process deletes records from the staging and exception tables based on the initialization options. If you selected *All by Selected Planned By* in the Items field on the Post Updates page, the process deletes all of the records if you also selected *All Data Types* in the Types field, or if you selected *Posted Data Types* in the Types field and the corresponding order types were selected for processing. The process deletes records for only those items matching the Planned By option criteria that you selected on the Post Updates page.

If you selected *Selected by Planning Instance* in the Items field on the Post Updates page, the process deletes all of the records for items that it locates in the PL_BU_ITEMS table, if you also selected *All Data Types* in the Types field, or if you selected *Posted Data Types* in the Types field and the corresponding order types were selected for processing. The process deletes records for only those items matching the Planned By option criteria that you selected on the Post Updates page.

If you selected *Selected by Planning Instance* in the Items field on the Post Updates page and entered a business unit, the process deletes all of the records for items in the business unit that it locates in the PL_BU_ITEMS table.

Validating Changes

If the Post Updates process encounters an error while validating changes made in PeopleSoft Supply Planning, it writes the error to the Review Post Errors Inquiry for the data type. You must make the appropriate changes manually in the transaction system.

Note: If an order date change is less than the item defined reschedule in or reschedule out range, use the Post Updates page to define how the Post Updates process handles the order date change. The Post Updates process can mark the change in error, approve the order automatically, ignore the order, or accept the order change through standard approval and validation.

This table lists the Post Updates process validation rules for order types:

Order Type	Valid Changes	Exceptions
Actual Purchases	<ul style="list-style-type: none"> • Cancel a schedule. • Change a schedule due date. • Change a schedule quantity. 	<ul style="list-style-type: none"> • Tolerance violation occurs and you request errors. • Existing line or schedule status is <i>Canceled</i> or <i>Closed</i>. • Existing PO header status is <i>Canceled</i> or <i>Closed</i>. • Existing PO header is being held. • PO schedule has been deleted. • Order changes in the transaction system, denoted by checking the current transaction fields against the original fields stored on the optimization table. • PO quantity is less than the received quantity.
Planned Purchases	Add a planned order.	Planned order created in a prior planning instance has been converted to a PO.

Order Type	Valid Changes	Exceptions
Actual Production	<ul style="list-style-type: none"> • Cancel an order. • Change the header start time, start date, end time, or end date. • Freeze an order. • Change an operation start time, start date, end time, or end date. • Substitute a component. • Change the header start or end quantity. 	<ul style="list-style-type: none"> • Tolerance violation occurs, and you request errors. • Item is a fast MRP item and the proposed header start date and time is not valid for the manufacturing calendar or five day work week. • Item is a fast MRP item and the proposed header end date and time is not valid for the manufacturing calendar or five day work week. • Order status is greater than in-process and a change is proposed to the header. • Order changes in the transaction system, denoted by tracking original field values (date, frozen flag, and quantity). • A pick plan is generated for the order. • Order is deleted from the transaction system. • Component substitute is not listed on the bill of materials (BOM) as a valid substitute. • Operation start date and time or end date and time is invalid.

Order Type	Valid Changes	Exceptions
Planned Production	<ul style="list-style-type: none"> • Add a planned order. • Substitute a component. 	<ul style="list-style-type: none"> • Item is a fast MRP item and the proposed header start date and time is not valid for the manufacturing calendar or five day work week. • Item is a fast MRP item and the proposed header end date and time is not valid for the manufacturing calendar or five day work week. • Production area and item combination is invalid. • Component substitute is not listed on the BOM as a valid substitute. • Operation start date and time or end date and time is invalid. • Operation does not exist on engineering routing. • Component is invalid. • Planned order created in a prior planning instance has been converted to a production order.
Actual Transfers	<ul style="list-style-type: none"> • Cancel an order. • Reschedule the scheduled arrival date and time. • Change an order priority. 	<ul style="list-style-type: none"> • Tolerance violation occurs and you request errors. • Order has been shipped, deleted, closed, or canceled. • Order changes within the transaction system, denoted by checking the current transaction fields against the original fields stored on the optimization table. If the priority, frozen option, schedule dates, or quantity have been modified since the optimization tables were loaded, the Post Updates process writes an exception. • Order quantity changed in the planning engine.

Order Type	Valid Changes	Exceptions
Planned Transfers	Add a planned order	Planned order created in a prior planning instance has been converted to a transfer order.
Sales Orders	Change the scheduled ship date and time.	<ul style="list-style-type: none"> • Tolerance violation occurs and you request errors. • Order does not exist. • Order changes in the transaction system, denoted by checking the current transaction fields against the original fields stored on the optimization table. • Order is not open. • Order is canceled by the planning engine.
Quotes	Change the scheduled ship date and time.	<ul style="list-style-type: none"> • Tolerance violation occurs and you request errors. • Order does not exist. • Order changes in the transaction system, denoted by checking the current transaction fields against the original fields stored on the optimization table. • Quote is converted. • Order is not open. • Order canceled by the planning engine.
Buying Agreement	Change the requested ship date and time.	<ul style="list-style-type: none"> • Tolerance violation occurs, and you request errors. • Order does not exist. • Agreement has been converted. • Order is not open. • Order canceled by the planning engine.

Order Type	Valid Changes	Exceptions
Material Stock Request	Change the scheduled ship date and time.	<ul style="list-style-type: none"> • Tolerance violation occurs and you request errors. • Order does not exist. • Order changes in the transaction system, denoted by checking the current transaction fields against the original fields stored on the optimization table. • Order is not open. • Order canceled by the planning engine.

Updating Staging and Exception Tables

The Post Updates process inserts orders with errors into the appropriate exception table. These exceptions can be seen in the Review Post Errors Inquiry for the data type.

For valid planned orders, the process:

- Updates the existing order if the order header exists in the staging table.

Staging tables can be seen in the Approve Updates Workbench for the data type.

- Inserts the header and all of the valid children into the staging table if the order header did not exist in the staging table.

For valid actual orders, the process inserts the order into the staging table. For actual purchases, sales orders, quotes, buying agreements, the process inserts only one row per distinct schedule.

The Post Updates process assigns new records in the staging tables a sequence number from the INSTALLATION_PL table. Sequence numbers are reset to 1 after the process assigns the sequence number 999,999,999. The process reserves sequence numbers as blocks by counting the number of valid records, then updating the counter by the appropriate amount, noting the first and last order number reserved.

Projected Useup

For discontinued items, the Post Updates process publishes the last date that a supply or demand has occurred (the useup date) with the final inventory balance resulting from that change in inventory position (the useup quantity on hand).

Post Updates Page

Use the Post Updates page (PL_POST_REQ) to extract new orders and changes to existing orders from the planning instance.

Validate and stage orders for application to the transaction system.

Navigation

Supply Planning > Commit Plan > Planning > Post Updates

Common Information

Planned By

Select any combination of distribution plan, material plan, or master plan items for posting. The selection determines what data is initialized and processed.

Initialize Data Types

Specify the data to include in the staging and exception tables after you run the Post Updates process. The data tables that you include are determined by the combination of values that you select in the Items and Types fields.

When you run the Post Updates process for a planning instance, you send the transaction system a set of recommended changes to the supply plan (written to the staging tables), as well as those changes that cannot be implemented due to validation errors (written to the exception tables). Use the Items and Types fields to specify how to delete the data from the previous Post Updates process. In the Items field, indicate whether you want to delete all of the prior data or delete only the data for items in the planning instance. In the Types field, indicate whether you want delete all of the prior data or only the data types that you intend to add back.

This table lists the valid combinations and the corresponding Post Updates process action:

Type Field Selection	Item Field Selection	Action
All Data Types	All by Selected Planned By	Initializes all of the data tables for all of the items that you included in the Planned By option criteria.
All Data Types	Selected by Planning Instance	Initializes all of the data tables that you included in the Planned By option criteria, but only for those items included within the corresponding planning instance.
Posted Data Types	All by Selected Planned By	Initializes all of the data tables selected for posting for all of the items that you included in the Planned By option criteria.
Posted Data Types	Selected by Planning Instance	Initializes all of the data tables selected for posting that you included in the Planned By option criteria, but only for those items included within the corresponding planning instance.

Planning Engine

The system restarts the planning engine at the end of the process so that links that show supply and demand appear on approval pages.

Pre-Post Auto-Shutdown	Select to stop the planning engine before running the Load Planning Instance process.
Post-Process Auto-Startup	Select to start the planning engine after you run the Load Planning Instance process.
URL (uniform resource locator)	Specify the location of a planning server where you want to start the planning engine after the Load Planning Instance has finished. If you do not specify a URL here, the system uses the default URL.
Select All	Click to include all of the data types that appear in the Posting Options group box for processing.
Clear All	Click to exclude all of the data types that appear in the Posting Options group box for processing.

Selection Criteria Tab

Select the Selection Criteria tab.

Select	Select to include the corresponding data type in the Post Updates processing.
Ignore Cutoff Fence	Select to ignore the item's cutoff fence for the corresponding data type. If you do not select this option, the Post Updates process includes only changes and new orders that occurred prior to the calculated cutoff date.
Inside Tolerance	<p>If an order date change is less than the item defined reschedule in or reschedule out range, define the action that the Post Updates process is to take. Values are:</p> <ul style="list-style-type: none"> • <i>Error</i>: The order shows up in the Review Post Errors Inquiry for the data type. The order cannot be applied to the transaction system. • <i>Approve</i>: The order can be applied to the transaction system. Approves the order change automatically, overriding other approval options. • <i>Ignore</i>: The order is not posted to the transaction system and the order does not appear in the Review Post Errors Inquiry for the data type. • <i>Accept</i>: The order can be applied to the transaction system. The change goes through standard approval and validation.
Pegged Approval Option	The Post Messages and Exceptions process will be updated with these options for approving changes to pegged orders:

- *Accept* This system will ignore that the order is pegged. The order can be applied to the transaction system. The change goes through standard approval and validation.
- *Approve* This system will ignore that the order is pegged. The order can be applied to the transaction system. Approves the order change automatically, overriding other approval options.
- *Error* The order shows up in the Review Post Errors Inquiry for the data type. The order cannot be applied to the transaction system.
- *Ignore* The order is not posted to the transaction system and the order does not appear in the Review Post Errors Inquiry for the data type.

Note: These options will only apply to orders that can be flagged as pegged.

Validation Options Tab

Select the Validation Options tab.

Approval Options

Specify whether the Post Updates process can approve changes automatically. Values are:

- *Manually Approve*: Select to approve all of the updates manually in their applicable components.
- *Auto Approve All*: Select to approve all updates automatically from the planning engine.
- *Auto Approve Within Horizon*: Select to approve all updates automatically from the planning engine based on the criteria that you define in the From Days, To Days, and Based On fields.

From Offset, To Offset and Based On Enter an offset from the current date for the horizon and indicate whether the horizon is based on the *Start Date*, *End Date*, or *Both*. These fields are available for entry only when you select *Auto Approve Within Horizon* in the Approval Options field.

Approve Schedules

Select if you want the Post Updates process to approve orders for supplier scheduled items automatically. If you define the corresponding Approval Option as automatic, but you do not select this option, the Post Updates process does not automatically approve supplier scheduled items.

If you define the approval option as *Manually Approve*, the Post Updates process ignores this option.

Allow Violation Approval

Select if you want the Post Updates process to apply the corresponding Approval Option to planned production or

transfer orders that have violations. If you want to exclude planned production or transfer orders with violations from the Post Updates approval process, you should run the Demand Violations Extract process prior to running the Post Updates process. The Demand Violations Extract process adds entries in the SPL_VIOLATIONS table for planned production and transfer orders that are pegged to a lower level supply order with a violation.

Expedite Options

Select an option for the Post Update process to consider.

Additionally, this process also checks supplier lead times. If planned or changed purchase order messages are within the supplier lead time, the system marks the message Expedite and you define the expedite option using the Expedite Options column. Values include:

Planning Time Fence: Select to have the system consider the planning time fence and flag planning messages to be expedited that are within the time fence. If a change has occurred to a purchase order within the planning time fence, the system marks that change message as expedite in the Post Updates process.

supplier Lead Time: Select to have the system consider supplier lead times and flag planning messages to be expedited that are within the lead time. If a change has occurred to a purchase order within the supplier's lead time, the system marks that change message as expedite in the Post Updates process.

Creating PeopleSoft Supply Planning Updates Reports

After you run the Post Updates process, you can create a report to display a list of updates from the planning engine, based on the selection criteria. On the Planning Updates report, you can review the new and changed orders generated by the Post Updates process for PeopleSoft Purchasing, Production, Inventory, and Order Management.

Note: PLS4011.SQR generates the output for the Planning Updates report.

Pages Used to Create PeopleSoft Supply Planning Updates Reports

Page Name	Definition Name	Usage
<u>Planning Updates Page</u>	PL_MESS_RPT	Define the search criteria for the Planning Updates report, which enables you to review a list of planning updates generated by PeopleSoft Supply Planning.
<u>Production Page</u>	PL_MESS_RPT2	Select the production update reporting options for the Planning Updates report.

Page Name	Definition Name	Usage
<u>Purchase/Sales Page</u>	PL_MESS_RPT3	Select the purchasing and order management update reporting options for the Planning Updates report.
<u>Transfers/Stock Requests Page</u>	PL_MESS_RPT4	Select the inventory update reporting options for the Planning Updates report.

Planning Updates Page

Use the Planning Updates page (PL_MESS_RPT) to define the search criteria for the Planning Updates report, which enables you to review a list of planning updates generated by PeopleSoft Supply Planning.

Navigation

Supply Planning > Commit Plan > Planning > Planning Updates Report

Plan Unit Group	Define the criteria to include only updates for a specific plan unit group code.
Planner Code	Define the criteria to include only updates for a specific planner.
Item ID	Define the criteria to include updates associated with specific items.
Run	Click to access the PeopleSoft Process Scheduler page, where you can initiate the process to generate the Planning Updates report.

Message Type

Planned	Select to include planned supply orders.
Reschedule	Select to include rescheduled orders.
Canceled	Select to include canceled orders.
Substitute	Select to include production updates for component substitutions.
Qty Change(quantity change)	Select to include changes in the planning quantity as part of the Planning Updates report.

Report Options

Production	Select to include production updates on the report.
Stock Requests	Select to include stock request updates on the report
Transfers	Select to include inventory transfer updates on the report.
Purchases	Select to include purchasing updates on the report.

Sales Orders	Select to include sales order updates on the report.
Quotations	Select to include quotation updates on the report.
Buying Agreements	Select to include buying agreement updates on the report.
Status	
Unapproved	Select to include updates that were not approved in a previous review sessions or using the Post Updates process.
Expedite	Select to include updates that are required before the planning time fence for the item.
Approved	Select to include updates that were previously approved but not processed.
Accepted	Select to include updates that are required after the planning time fence but before the action message cutoff fence for the item.
Processed	Select to include updates that were previously approved and applied to the transaction system
Cutoff	Select to include updates for items that have updates beyond the action message cutoff fence defined for the item.
Tolerance	Select to include reschedules that occur within an interval bound by the reschedule in and out factors defined for the item. The system reports all of the orders rescheduled outside of the tolerance. Select Within Tolerance to report orders which are inside of tolerance.
Open Pegs	Select to include updates to orders that are pegged to unfulfilled demand.
No Open Pegs	Select to include updates to orders that are not pegged to unfulfilled demand

Production Page

Use the Production page (PL_MESS_RPT2) to select the production update reporting options for the Planning Updates report.

Navigation

Supply Planning > Commit Plan > Planning > Planning Updates Report > Production

Order Status

Entered	Select to include updates for entered orders.
Firmed	Select to include updates for firmed orders.

Released	Select to include updates for released orders.
In Process	Select to include updates for orders in process.
Production Class	
Schedules	Select to include production schedules.
Production IDs	Select to include production IDs.
From/To	Define the criteria to include only those updates within the specified date range.

Purchase/Sales Page

Use the Purchase/Sales page (PL_MESS_RPT3) to select the purchasing and order management update reporting options for the Planning Updates report.

Navigation

Supply Planning > Commit Plan > Planning > Planning Updates Report > Purchase/Sales

Purchases

Release Date From/To	Define the criteria to include only those updates within the specified date range.
Due Date From/To	Define the criteria to include only those updates within the specified date range.

Sales Orders

Scheduled Ship Date From/To	Define the criteria to include only those updates within the specified date range.
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Buying Agreements

Scheduled Ship Date From/To	Define the criteria to include only those updates within the specified date range.
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Transfers/Stock Requests Page

Use the Transfers/Stock Requests page (PL_MESS_RPT4) to select the inventory update reporting options for the Planning Updates report.

Navigation

Supply Planning > Commit Plan > Planning > Planning Updates Report > Transfers/Stock Requests

Transfers

Destination Unit	Specify a destination business unit to include only updates from that unit.
Destination Planner Code	Specify a destination planner code to include only updates from a specific destination planner.
Scheduled Ship Date From/To	Define the criteria to include only those updates within the specified date range.
Scheduled Arrival Date From/To	Define the criteria to include only those updates within the specified date range.

Stock Requests

Scheduled Ship Date From/To	Define the criteria to include only those updates within the specified date range.
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Displaying Item Useup Information

This topic provides an overview of item useup, and discusses how to generate a PeopleSoft Supply Planning Useup report, and review item useup information.

Pages Used to Create Useup Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Planning Useup Report	PL_USEUP_RPT	Define business unit and item parameters to generate a report displaying useup items, their phase-out dates, and their substitute items. Understanding Item Useup
Review Planning Useup inquiry Page	PL_USEUP_ITEMS	Review item useup details, such as effectivity dates, quantity on hand at the useup date, and availability quantities of substitutes.

Understanding Item Useup

PeopleSoft Supply Planning enables you to plan for the end life of components and the beginning of life for their replacement components. Engineering changes, technical upgrades, and cost can create a need to replace a component.

Using PeopleSoft Supply Planning, you can:

- Specify the phase-out date of the component.

- Use up the remaining stock of the old component before introducing the new component into production.
- Plan to purchase the new component (using the effectivity date), while using the old stock, until you deplete the old component supply.

Use the Item Useup inquiry page and Planning Updates report to obtain planning information about discontinued items (including the last change in the inventory position for the item and the expected ending quantity on hand at that point) and substitute items available to fulfill remaining demand for the item.

Phase-Out Dates

PeopleSoft Supply Planning considers an item's discontinuation date to be its phase-out date. On the Define Business Unit Item - General page, select *Discontinue* in the Current or Future status fields for items that you want to phase-out. If you define the Current date field with the value *Discontinue*, the system uses the effective date of the status as the phase-out date. If you defined the Future date field with the value *Discontinue*, the system uses the effective date of the future status as the phase-out date.

PeopleSoft Supply Planning does not generate new supply nor does it replenish safety stock levels after an item's phase-out date. If the item is required as a component in a production ID after the phase-out date, solvers use substitutes defined on BOM to fulfill any unsatisfied demand. If no available quantity on hand exists for a substitute, the solvers create new supply for the substitute.

Post Updates Process

The Post Updates process writes useup information back to PeopleSoft SCM. For each discontinued item, the Post Updates process publishes the last date that a supply or demand has occurred (the useup date), as well as the final inventory balance resulting from that change in inventory position (the useup quantity on hand).

Review Planning Useup inquiry Page

Use the Review Planning Useup (inquiry) page (PL_USEUP_ITEMS) to review item useup details, such as effectivity dates, quantity on hand at the useup date, and availability quantities of substitutes.

Navigation

Supply Planning > Commit Plan > Planning > Review Planning Useup

Item ID	Displays the parent item for the item being queried.
Useup Date	Indicates the projected useup date based on the last change in inventory position for the item.
Phase-Out Date	Indicates when useup logic should go into effect for the original component. After the phase-out date, solvers use supplies but do not replenish the stock for the original component.
Useup Quantity On Hand	Displays the projected quantity on hand at the time of the projected useup date.

Quantity Available	Displays the current quantity available from PeopleSoft Inventory.
Planning Date and Time	Displays the date and time of the last Post Updates process.
Component Where Used	
Component ID	Indicates the name of the component being used in the corresponding operation sequence.
BOM State	Specifies whether the BOM is an engineering BOM or a production BOM.
BOM Type	Only BOM types defined as Production are visible in PeopleSoft Supply Planning. For rework and teardown BOM types, PeopleSoft Supply Planning uses the production ID for component and operation lists.
BOM Code	Displays the BOM used to generate the initial component list for the order.
Operation Sequence	<p>Indicates where in the manufacturing process you need the component. The operation sequence refers to an operation on the assembly item's routing. The default operation sequence is 0, which is the first operation of the manufacturing process.</p> <p>Define the operation sequence on the item's routing by using the Routing Definition Summary page. If you set the operation sequence for all of the items to 0, the system assumes that all of the component items are needed at the beginning of production and therefore must be issued at the start of the first operation.</p>
Standard UOM (standard unit of measure)	Displays the item's standard UOM defined in the transaction system. The system displays all of the quantities in PeopleSoft Supply Planning in the item's UOM.
Effective Date and Obsolete Date	Displays the effective and obsolete dates for the components on a BOM.
Substitute Items	
Priority	Displays the substitution item priority rank.
Substitute Item ID	Displays the unique substitute item for the item. When you define substitutes for items on the Manufacturing BOMs - Components: Substitutes page, PeopleSoft Supply Planning automatically selects these substitutes when the quantity on hand for discontinued items runs out. If you do not define substitutes for items designated as discontinued, a shortage of that item might occur if demand exceeds the existing quantity on hand.

From Date and To Date	Displays the start and end date to indicate when the substitution is valid.
Rate	Indicates the quantity of the substitute item required to replace the original item in the item's standard UOM. The conversion rate can be different at the SetID, business unit, and BOM levels.
Quantity Available	Displays the current quantity available from PeopleSoft Inventory or the substitute item.

Resetting the Locks for the Post Updates Process

If the system encounters an error during processing for a specific update type, it locks the Post Updates process. You must reset the locks before any other request can post updates for the update type for the corresponding business unit.

This topic discusses how to reset the locks for the Post Updates process.

Page Used to Reset the Locks for the Post Updates Process

Page Name	Definition Name	Usage
Reset Post Locks Page	PL_BU_LOCK_MAINT	Select orders locked by the Post Updates process.

Reset Post Locks Page

Use the Reset Post Locks page (PL_BU_LOCK_MAINT) to select orders locked by the Post Updates process.

Navigation

Supply Planning > Commit Plan > Planning > Reset Post Locks

Process Date Time	Indicates the date and time that the Post Updates process was initiated.
Lock Status	Indicates if a given update type for the specific business unit is currently locked. Update types are locked during the post update process and released if the process completes successfully.

Committing PeopleSoft Inventory Updates

Understanding the PeopleSoft Inventory Updates Business Process

When you run the Post Updates process (PL_POST), it generates inventory recommendations, updates, and post errors. At that time you can review, analyze, approve, and apply those inventory updates to PeopleSoft Inventory.

You can manage the PeopleSoft Inventory updates from PeopleSoft Supply Planning after you run the Post Updates process.

To process PeopleSoft Inventory updates:

1. Review the errors that occurred during the Post Updates process using the Review Inventory Post Errors component.

When you run the Post Updates process, the system finds errors. The system generates error messages when the situation in PeopleSoft Inventory has changed from the last time that the PeopleSoft Supply Planning update was initiated. For example, PeopleSoft Supply Planning suggests canceling an interunit order, but the interunit order has already been completed in PeopleSoft Inventory.

2. (Optional) Review and approve the recommended PeopleSoft Inventory updates using the Approve Inventory Updates component.

Use this component to manually approve the updates that you want to apply to PeopleSoft Inventory. You can automatically approve all of the changes during the Post Updates process.

3. Apply the approved PeopleSoft Inventory updates to PeopleSoft Inventory by initiating the IN Apply Planning Messages COBOL process (INPAPLAN) using the Apply Inventory Updates component.
4. Review the errors that occurred from the IN Apply Planning Messages COBOL process using the Review Apply Inventory Errors component.

When you apply the PeopleSoft Inventory updates and the system finds data errors, the system generates error messages. These error messages might have been generated because a change in the production data occurred since you ran the IN Apply Planning Messages process or because a business rule violation occurred, such as an invalid intercompany setup.

Using PeopleSoft Inventory, you can manage these types of updates from PeopleSoft Supply Planning:

- Creation of interunit transfer orders.
- Cancellation and reschedule of interunit transfer orders and internal and external material stock requests.
- Frozen interunit transfers and material stock requests.

- Changes in demand priority associated with an interunit transfer.

Prerequisites

Before you begin to review and apply inventory updates, you must:

- Generate the supply plan.
- Run the Post Updates process.

Related Links

[Understanding the Plan Generation Process](#)

[Understanding PeopleSoft Supply Planning Planned Order Numbering](#)

Common Elements Used to Review PeopleSoft Inventory Post Errors



Click the Item Search button located next to the Item ID field to access a transfer page of item-related links. On the transfer page, click the Item Search link to search for items using the Item Search Criteria page

Note: Link options on transfer pages vary depending on the component and the item with which you are working.

Note: Only items with a status of *Active* or *Discontinue* are valid.

Interunit

Select to view interunit order errors or updates that are associated with the search criteria that you selected.

Internal/External

Select to view internal or external material stock request errors or updates that are associated with the search criteria that you selected.

Planned

Select to include planned order-type errors in the search results for PeopleSoft Inventory errors.

Existing Order

Select to include existing order-type errors in the search results for PeopleSoft Inventory errors.

From and To

Select dates to include in the search criteria for the schedule date and schedule arrive date errors.

Reviewing PeopleSoft Inventory Post Errors

This topic discusses how to search and review PeopleSoft Inventory post error details.

Pages Used to Review PeopleSoft Inventory Post Errors

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Review Inventory Post Errors - Search Page	DEM_EXC_SRC_INV	Define the search criteria for the inventory post errors that you want to review.
Review Inventory Post Errors - Details Page	DEM_EXC_SUM_INV	View the details of an inventory post error that occurred during the Post Updates process.

Review Inventory Post Errors - Search Page

Use the Review Inventory Post Errors - Search page (DEM_EXC_SRC_INV) to define the search criteria for the inventory post errors that you want to review.

Navigation

Supply Planning > Commit Plan > Inventory > Review Inventory Post Errors > Search

Select the search criteria for the inventory post errors that you want to view. Select Plan Unit Group or Unit, Request Type, Order Type, and Error Type. To narrow the error selection, you can select any of the other search fields: Planner Cd (planner code), Item ID, Schedule Date(scheduled shipped date), and Schedule Arrive (scheduled arrival date).

Error Type

Cancel/Delete/Closed

Select to view cancellation, deletion, and closure errors that occurred in PeopleSoft Inventory and are associated with the search criteria that you selected.

Order Changed

Select to view order change errors that are associated with the search criteria that you selected. The order in PeopleSoft Inventory changes after being loaded into PeopleSoft Supply Planning.

Within Tolerance

Select to view tolerance errors that are associated with the search criteria that you selected.

When you run the Post Updates process, you can decide how the system should handle the updates pertaining to the reschedule of orders that are within tolerance. One of the options is to post an error if the reschedule update is invalid.

See [Posting PeopleSoft Supply Planning Updates to the Transaction System](#).

Quantity Changed

Select to view quantity change errors that are associated with the search criteria that you selected.

Quantity change errors occur if the order quantity on existing inventory transactions in the PeopleSoft Inventory system do not match the order quantity on the update message from PeopleSoft Supply Planning.

Previously Converted

Select to view previously converted errors that are associated with the search criteria that you selected.

These types of errors occur if, for example, a planned interunit transfer is created but not applied before the interunit transfer is brought back into PeopleSoft Supply Planning. The next time that you run the Post Updates process, the interunit transfer order may have already been converted into an actual interunit transfer order from the last run. This could produce a doubling of the interunit transfer order in the system.

Open Pegs

Select to include updates to orders that are pegged to unfulfilled demand. The default value for the field is deselected.

Review Inventory Post Errors - Details Page

Use the Review Inventory Post Errors - Details page (DEM_EXC_SUM_INV) to view the details of an inventory post error that occurred during the Post Updates process.

Navigation

Supply Planning > Commit Plan > Inventory > Review Inventory Post Errors > Details

When this page initially appears, all of the post errors that meet the selection criteria appear on the page. You can view more information pertaining to the error by selecting the different tabs—Exception Details, Description, and Order, Dates, —within the page.

Message Text

The system displays error message text that is associated with each error message. Messages are:

- *Cannot be Applied Due to Cancel, Delete, Close, Ship, or Hold.*
- *Cannot be Applied Due to Order Change.*
- *Order was Rescheduled Within Tolerance.*
- *Planned Order was Previously Converted.*
- *Quantity Changed in Planning Engine*

Approving PeopleSoft Inventory Updates

This topic discusses how to review and approve PeopleSoft Inventory updates.

Pages Used to Approve PeopleSoft Inventory Updates

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Approve Inventory Updates - Search Page</u>	DEM_CHG_SRC_SPL	Define the search criteria for the PeopleSoft Inventory updates that you want to review.
<u>Approve Inventory Updates - Summary Page</u>	DEM_CHG_SUM_SPL	Review and approve PeopleSoft Inventory updates that you want to apply to PeopleSoft Inventory.
Message Detail Page	DEM_CHG_MSD_SPL	View the message details for a particular PeopleSoft Inventory update. <u>Approve Inventory Updates - Summary Page</u>

Approve Inventory Updates - Search Page

Use the Approve Inventory Updates - Search page (DEM_CHG_SRC_SPL) to define the search criteria for the PeopleSoft Inventory updates that you want to review.

Navigation

Supply Planning > Commit Plan > Inventory > Approve Inventory Updates > Search

Image: Search page

This example illustrates the fields and controls on the Search page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Search' page for 'Inventory Messages'. It features a top navigation bar with 'Search' and 'Inventory Messages' tabs. Below this is a 'Use Saved Search' field with a magnifying glass icon. The main search area is divided into several sections:

- Plan Unit Group**: A text field with a magnifying glass icon.
- Unit**: A text field with a magnifying glass icon.
- Source Planner**: A text field with a magnifying glass icon.
- Item ID**: A text field with a magnifying glass icon and a small document icon.
- Item Group**: A text field with a magnifying glass icon.
- Item Family**: A text field with a magnifying glass icon.
- Destination Unit Group**: A text field with a magnifying glass icon.
- Destination Unit**: A text field with a magnifying glass icon.
- Destination Planner**: A text field with a magnifying glass icon.
- Category**: A text field with a magnifying glass icon.
- Utilization Type**: A text field with a magnifying glass icon.

Below these fields are several sections with checkboxes and dropdowns:

- Schedule Date**: 'From' and 'To' text fields with magnifying glass icons.
- Schedule Arrive**: 'From' and 'To' text fields with magnifying glass icons.
- Message Type**: Checkboxes for 'Planned' (checked), 'Reschedule In', 'Reprioritize', 'Canceled', and 'Reschedule Out'.
- Approval**: Checkboxes for 'Approved' and 'Unapproved' (checked).
- Planning Status**: Checkboxes for 'Expedite', 'Cutoff', and 'Accepted' (checked).
- Order Type**: Checkboxes for 'Interunit' (checked) and 'Internal/External' (checked).
- Pegging**: Checkboxes for 'Open Pegs' and 'No Open Pegs'.
- Status**: Checkboxes for 'Within Tolerance' (checked) and 'Outside Tolerance', and a checkbox for 'Processed'.
- Planned Order Violations**: A dropdown menu showing 'Both'.
- Priority**: 'From' and 'To' text fields, with 'To' set to '999'.

At the bottom, there are buttons for 'Search', 'Save Search Criteria' (with a magnifying glass icon), 'Delete Saved Search' (with a trash icon), 'Save' (with a floppy disk icon), and 'Notify' (with an envelope icon). A breadcrumb trail at the very bottom reads 'Search | Inventory Messages'.

The Search page enables you to define a variety of selection criteria on which to base the search for inventory information. Select the search criteria for the PeopleSoft Inventory updates that you want to review. You must select a Plan Unit Group or Unit or a Destination Unit Group or Destination Unit. Also, you must select at least one message type, approval type, planning status, and order type for the search criteria.

To limit the update selection, you can select any of the other search fields including Source Planner or Destination Planner, Item ID, Category, Item Group, Item Family, Utilization Type, Schedule Date (scheduled shipped date), Schedule Arrive (scheduled arrival date), or Priority.

If a default value planning instance has been associated with a user, the system automatically displays the business unit group assigned to that planning instance. If there is not a default business unit group, the system uses the business unit defined as the user's preference.

Click the Search button to retrieve inventory updates that match the selection criteria. The system displays a message if it does not find inventory updates based on the criteria that you enter.

To save the selection criteria that you define, enter a name for the criteria in the Use Saved Search field and click the Save Search Criteria button at the bottom of the page. After saving search criteria, you can select it from the list of values. You can also delete saved searches by selecting the saved search and then clicking the Delete Search Criteria button.

Message Type

Planned	Select to view updates directing PeopleSoft Inventory to create planned interunit transfers. The system selects this check box by default when the page initially appears.
Reschedule In	Select to include updates in the search results where inventory orders have been rescheduled to an earlier date.
Reprioritize	Select to include updates that have been reprioritized in PeopleSoft Supply Planning.
Canceled	Select to include updates with cancellations to inventory orders.
Reschedule Out	Select to include updates in the search results where inventory orders have been rescheduled to a later date.

Approval

Unapproved	Select to include updates in the search results that were not approved in previous review sessions. The system selects this check box by default when the page initially appears.
Approved	Select to include inventory updates that were previously approved but not processed.

Planning Status

Expedite	Select to include inventory updates in the search results that are required before the planning time fence.
Cutoff	Select to include updates for items that have updates beyond the action message cutoff fence that is defined for the item.
Accepted	Select to include updates that are between the planning time fence and the action message cutoff fence.

Order Type

Interunit	Select to include interunit order errors or updates in search results that are associated with the search criteria that you selected.
Internal/External	Select to include internal or external material stock request errors or updates that are associated with the search criteria that you selected.

Pegging

Open Pegs

Select to include updates to orders in the search results that are pegged to unfulfilled demand. The default value for this check box is deselected.

No Open Pegs

Select to include updates to transfer orders that are pegged to unfulfilled demand.

Priority

From

Enter a numerical value that you want to use as the start of a range of priority numbers to include in the search results.

Priority values define the priority that the planning engine uses to consider a sourcing option to meet demand. The system returns inventory updates where the sourcing template priority matches the values contained in the range of number that you enter.

To

Enter a numerical value to use as the end of a range of priority numbers. The default value for the field is 999. You can enter a lower number.

Status

Within Tolerance and Outside Tolerance

Select to view transfer order reschedules that are within and outside tolerance. If you select the options, the system displays any updates that fall within the schedule in and out of tolerances that are defined for the items selected. The reschedule in factor sets the tolerance for updates to move an order to an earlier date.

The reschedule out factor sets the tolerance for updates to move an order to a later date. PeopleSoft Supply Planning uses these factors to determine how orders within tolerance are processed by the Post Updates process. Orders within tolerance can be automatically approved, marked as a valid change pending approval, considered an exception, or ignored all together.

Processed

Select to include updates in the search results that were previously approved and processed. In this case, these updates and the inventory data have been updated with recommended changes from PeopleSoft Supply Planning.

Planned Order Violations

Violations

Select an option for processing planned transfer orders. Values are:

- *Exclude Violated*: Excludes planned transfers with violations.

- *Only Violated:* Includes only planned transfers with violations.
- *Both:* All planned transfers.

Approve Inventory Updates - Summary Page

Use the Approve Inventory Updates - Summary page (DEM_CHG_SUM_SPL) to review and approve PeopleSoft Inventory updates that you want to apply to PeopleSoft Inventory.

Navigation

Supply Planning > Commit Plan > Inventory > Approve Inventory Updates > Summary

When this page initially appears, all of the updates that meet the selection criteria appear on the page. You can view more information pertaining to the update by selecting the different tabs—Message Detail, Status, Item Information, Order, and Shipping Details—within the page.



Click the Approve All button or link to approve all of the updates that appear.



Click the Reset Approval button or link to clear all of the updates that are already approved.

Refresh

Click to update the Message Summary grid so that you can view the planned transfers that were added when you added planned transfers.

Approved

Select this check box next to an individual update to approve that update.

Details

Click to view all of the details for a particular update. When you click this button, the Message Detail page appears.

Applying PeopleSoft Inventory Updates

This topic discusses how to apply PeopleSoft Inventory updates.

Page Used to Apply PeopleSoft Inventory Updates

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Apply Inventory Updates - Apply Planning Messages Page	DEM_CHG_REQ_INV	Initiate the IN Apply Planning Messages COBOL process that processes the PeopleSoft Inventory updates that you have approved. This process applies the updates so that PeopleSoft Inventory can act on the suggestions made by PeopleSoft Supply Planning.

Apply Inventory Updates - Apply Planning Messages Page

Use the Apply Inventory Updates - Apply Planning Messages page (DEM_CHG_REQ_INV) to initiate the IN Apply Planning Messages COBOL process that processes the PeopleSoft Inventory updates that you have approved.

This process applies the updates so that PeopleSoft Inventory can act on the suggestions made by PeopleSoft Supply Planning.

Navigation

Supply Planning > Commit Solution > Inventory > Apply Inventory Updates > Apply Planning Messages

Planner Code

Select *All* or *Single* for the source and destination planner codes. If you select *Single*, enter the planner code in the field that is provided; only those items belonging to that planner are processed.

Item Selection

Select *All* or *Single* for the item. If you select *Single*, enter the item number in the field that is provided.

Reviewing Applied PeopleSoft Inventory Errors

This topic discusses how to review applied PeopleSoft Inventory updates and errors.

Pages Used to Review Applied PeopleSoft Inventory Errors

Page Name	Definition Name	Usage
Review Apply Inventory Errors - Review Planning Exceptions Page	DEM_CHG_EXC_INV	Review the PeopleSoft Inventory updates that have been applied to the system through the IN Apply Planning Messages COBOL process. This page displays the errors that occurred for a particular update and also displays the updates that were processed successfully.
Exception Detail Page	DEM_CHG_EXcD_INV	View the order details of a specific PeopleSoft Inventory error or processed update. Review Apply Inventory Errors - Review Planning Exceptions Page

Review Apply Inventory Errors - Review Planning Exceptions Page

Use the Review Apply Inventory Errors - Review Planning Exceptions page (DEM_CHG_EXC_INV) to review the PeopleSoft Inventory updates that have been applied to the system through the IN Apply Planning Messages COBOL process.

This page displays the errors that occurred for a particular update and also displays the updates that were processed successfully.

Navigation

Supply Planning > Commit Plan > Inventory > Review Apply Inventory Errors > Review Planning Exceptions

When this page initially appears, all of the updates and errors that were processed by the IN Apply Planning Messages process appear. You can view more information pertaining to the error or update by selecting the different tabs—Planning Exceptions and Exception Details—within the page.

Planning Exceptions Tab

Type

The system displays the type of message for each update or error. Values are:

- *Cancel*
- *New*
- *Priority*
- *Reschedule*

Status

The system displays the status of the message or error. Values are:

- *ICT Inval*: Intercompany setup invalid.
- *Item Appr*: Item not approved.
- *Item Def*: Business unit item not defined.
- *IU Own*: No interunit ownership.
- *Not Found*: Demand line not found.
- *Printed*: Picklist printed.
- *Processed*: Processed.
- *SetIDs*: SetIDs different.
- *Shipping*: In shipping.

Demand Source

The system displays the source of demand for the order. Values are:

- *IN*: PeopleSoft Inventory.
- *PL*: PeopleSoft Supply Planning.
- *PR*: PeopleSoft Purchasing requisition.

Details

Click the Details link next to an update or error to view the order details for the error or update. When you click this link, the Exception Detail page appears.

Committing PeopleSoft Production Control Updates

Understanding PeopleSoft Production Control Updates Business Process

To meet item demands and target inventory levels, PeopleSoft Supply Planning creates planned production and recommends changes to existing production for PeopleSoft Production Management for execution. Within PeopleSoft Production Management, planned production can be automatically converted into production IDs and production schedules. In addition, you can cancel or reschedule existing production at the production and operations levels. You can also make component substitutions.

After you generate a supply plan, you can transfer new and existing production information from PeopleSoft Supply Planning to Production Management. PeopleSoft Supply Planning enables you to transfer production plan information back and forth between PeopleSoft Supply Planning and Production Management.

You can manage the production control updates from PeopleSoft Supply Planning after you run the Post Updates process (PL_POST).

To process production control updates:

1. Review the errors that occur from the Post Updates process using the Review Production Post Errors component.

When you run the Post Updates process, PeopleSoft Supply Planning generates error messages. These error messages are generated, because a change in the production data occurred since the last time that you ran the Post Updates process, or a violation of a business rule occurred, such as an invalid calendar date.

2. (Optional) Review and approve the recommended production control updates using the Approve Production Updates component.

Use this component to manually approve the updates that you want to apply to PeopleSoft Production Management. You can automatically approve all of the changes during the Post Updates process.

3. Apply the approved production control updates by initiating the Apply Planning Messages COBOL process (SFPAPLNS) using the Apply Production Updates component.

This process generates an error log. Use this error log to view errors that occurred while applying the production control updates to PeopleSoft Production Management.

Use PeopleSoft Production Management to manage these updates from PeopleSoft Supply Planning:

- Creation of production IDs or schedules.

- Cancellation and reschedule of existing production IDs or schedules.
- Reschedule of operations for existing production IDs.
- Frozen production IDs or schedules.
- Component substitution for a production ID.
- Quantity change for existing production IDs.

Prerequisites

Before you begin to review and apply production control updates, you must:

- Generate the supply plan.
- Run the Post Updates process.

Related Links

[Understanding the Plan Generation Process](#)

[Understanding PeopleSoft Supply Planning Planned Order Numbering](#)

Common Elements Used to Review Production Control Post Errors

Production ID



The system displays the production ID or production schedule associated with the update or the error. If the message or update is pertaining to a new order for a production schedule then *Schedule* will appear in this field.

Click the Item Search button located next to the Item ID field to access a transfer page of item-related links. On the transfer page, click the Item Search link to search for items using the Item Search Criteria page.

Note: Link options on transfer pages vary depending on the component and the item with which you are working.

Note: Only items with a status of *Active* or *Discontinue* are valid.

Reviewing Production Control Post Errors

This topic discusses how to review Production Control Post Errors

Pages Used to Review Production Control Post Errors

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Review Production Post Errors - Search Page</u>	PL_PROD_EXCPT_SRCH	Define the search criteria for the production control post errors that you want to review.
<u>Review Production Post Errors - Production Errors Page</u>	PL_PROD_EXCEPT_SPL	View the production control errors that occurred from the Post Updates process.

Review Production Post Errors - Search Page

Use the Review Production Post Errors - Search page (PL_PROD_EXCPT_SRCH) to define the search criteria for the production control post errors that you want to review.

Navigation

Supply Planning > Commit Plan > Production Control > Review Production Post Errors > Search

Select the search criteria for the production post errors that you want to view. Select a unit or plan unit group; order type, and at least one error type.

Error Type

Cancel/Delete/Closed

Select this check box to view cancellation, deletion, and closure errors that occurred in PeopleSoft Production Management and are associated with the search criteria that you selected.

Calendar Violation

Select this check box to view errors pertaining to calendar violations—order dates that are not valid for the manufacturing calendar or a five day work week—associated with the search criteria that you selected.

No Production Area

Select this check box to view errors pertaining to no production area—the item on the order does not have a valid production area—associated with the search criteria that you selected.

Order Changed

Select this check box to view order change errors associated with the search criteria that you selected. The order in PeopleSoft Production Management changes after being loaded into PeopleSoft Supply Planning.

Pick Plan Generated

Select this check box to view pick plan errors associated with the search criteria that you selected. The pick plan has already been generated for the order; therefore, you cannot apply changes.

Tolerance

Select this check box to view tolerance errors that are associated with the search criteria that you selected.

When you run the Post Updates process, you can decide how the system should handle the updates pertaining to the reschedule of

orders that are within tolerance. One option is to post an error if the reschedule update is invalid.

See [Posting PeopleSoft Supply Planning Updates to the Transaction System](#).

Illegal Substitution

Select this check box to view illegal substitution errors associated with the search criteria that you selected. The component substitute does not appear on the bill of materials as a valid substitute.

No Routing

Select this check box to view no routing errors associated with the search criteria that you selected. The production operation does not exist on the routing for the item on the order.

Previously Converted

Select this check box to view previously converted errors that are associated with the search criteria that you selected.

These type of errors occur if, for example, a planned production order is created but not applied before it is brought back into PeopleSoft Supply Planning. The next time that you run the Post Updates process, the planned production order may have already been converted into an actual production order from the last run. This may cause a doubling of the orders in the system.

Open Pegs

Select to include updates to orders that are pegged to unfulfilled demand.

Quantity Change

Select to view quantity change errors associated with the search criteria that you selected. The system changes the production order status to In Process. Quantity change for production orders with a status of In Process are flagged as error.

Review Production Post Errors - Production Errors Page

Use the Review Production Post Errors - Production Errors page (PL_PROD_EXCEPT_SPL) to view the production control errors that occurred from the Post Updates process.

Navigation

Supply Planning > Commit Plan > Production Control > Review Production Post Errors > Production Errors

When this page initially appears, it includes all of the post errors that meet the selection criteria. You can view more information pertaining to the error by selecting the different tabs— Details, Quantity, Dates, Inventory Pegging, and Substitution.

Message Text

Displays error message text associated with each post error. Messages are:

- *A Pick Plan Has Been Generated for This Order - Must Resolve Pick Plan.*
- *Cannot be Applied Due to Cancel, Delete, or Close.*

- *Cannot be Applied Due to Order Change.*
- *Invalid Calendar Date/Time for Production Header.*
- *Invalid Calendar Date/Time for Production Operation.*
- *Invalid Component Substitution at Operation.*
- *Order was Rescheduled Within Tolerance.*
- *Planned Order was Previously Converted.*
- *Production Area Does Not Exist for Business Unit/Item/BOM/Routing.*
- *Production Operation Does Not Exist On Routing.*
- *Cannot Apply Quantity Change because Production is In Process.*

Approving Production Control Updates

This topic discusses how to review and approve the production control updates.

Pages Used to Approve Production Control Updates

Page Name	Definition Name	Usage
<u>Approve Production Updates - Message Search Page</u>	PL_PROD_SRCH_SPL	Define the search criteria for the production control updates that you want to review.
<u>Approve Production Updates - Production Messages Page</u>	PL_PR_MSG_SUM_SPL	Review and approve the production control updates that you want to apply to PeopleSoft Production Management.
Approve Production Updates - Order Details	PL_PR_HDR_DTL_SPL	View production and operation details for each production control update.
Approve Production Updates - Substitution	PL_PR_SUB_SPL	View the substitutes for a production control update.

Approve Production Updates - Message Search Page

Use the Approve Production Updates - Search page (PL_PROD_SRCH_SPL) to define the search criteria for the production control updates that you want to review.

Navigation

Supply Planning > Commit Plan > Production Control > Approve Production Updates > Search

Image: Search page

This example illustrates the fields and controls on the Search page. You can find definitions for the fields and controls later on this page.

The Search page interface includes the following sections and controls:

- Search Tab:** Active tab at the top.
- Use Saved Search:** A text input field with a search icon.
- Plan Unit Group:** A text input field with a search icon.
- Unit:** A text input field with a search icon, containing the value "US001".
- Item ID:** A text input field with a search icon and a small icon to the right.
- Item Group:** A text input field with a search icon.
- Item Family:** A text input field with a search icon.
- Planner Code:** A text input field with a search icon.
- Category:** A text input field with a search icon.
- Utilization Type:** A text input field with a search icon.
- Production Start Dates:** A section with "From" and "To" text input fields, each with a search icon.
- Production Class:** A section with checkboxes for "Schedules" (checked) and "Production IDs" (checked).
- Message Type:** A section with checkboxes for "Planned" (checked), "Canceled", "Reschedule In", "Reschedule Out", "Substitution", and "Qty Change".
- Approval:** A section with checkboxes for "Approved" and "Unapproved" (checked).
- Planning Status:** A section with checkboxes for "Expedite", "Cutoff", and "Accepted" (checked).
- Order Status:** A section with checkboxes for "Entered", "Firmed", "Released", and "In Process".
- Pegging:** A section with checkboxes for "Open Pegs" and "No Open Pegs".
- Status:** A section with checkboxes for "Within Tolerance" (checked), "Outside Tolerance", and "Processed".
- Planned Order Violations:** A section with a "Violations" dropdown menu set to "Both".
- Buttons:** "Search", "Clear", "Save Search Criteria" (with a floppy disk icon), and "Delete Saved Search" (with a trash icon).

The Search page enables you to define a variety of selection criteria on which to base the search for production information. You can base searches on a specific production business unit or a plan unit group. You must select at least one message type and at least one check box, Approved or Unapproved in the Approval group box to perform the search.

If a default value planning instance has been associated with a user, the system automatically displays the business unit group assigned to that planning instance. If there is not a default business unit group, the system uses the business unit defined as the user's preference.

Other selection criteria includes, for example, category, supplier SetID, and item ID, group and family. You can also limit the search to specific production start dates.

Click the Search button to retrieve production updates that match the selection criteria. The system displays a message if it does not find production updates based on the criteria that you enter.

To save the selection criteria that you define, enter a name for the criteria in the Use Saved Search field and click the Save Search Criteria button at the bottom of the page. After saving search criteria, you can select it from the list of values. You can also delete saved searches by selecting the saved search and then clicking the Delete Search Criteria button.

Production Class

Schedules

Select to include messages for production schedules in the search results.

Production IDs

Select to include messages for production IDs in the search results.

Message Type

Planned	Select to include production updates pertaining to planned orders in the search results.
Reschedule In	Select to include updates in search results that pertain to production orders that have been rescheduled to an earlier date.
Substitution	Select to include production updates in search results that pertain to orders with substitutes.
Canceled	Select to include production updates that pertain to canceled orders.
Reschedule Out	Select to include production updates that pertain to production orders that have been rescheduled to a later date.
Qty Change (quantity change)	Select to include production updates with changed quantities in the returned results.

Approval

Unapproved	Select to include updates that were not approved in previous review sessions. The system selects this check box by default.
Approved	Select to include production updates in search results that were previously approved but not processed.

Planning Status

Expedite	Select to include production updates in the search results that are required before the planning time fence.
Accepted	Select to include production updates that are between the planning time fence and the action message cutoff fence.
Cutoff	Select to include production updates that are beyond the action message cutoff fence.

Order Status

Entered	Select to include production updates that are in an Entered status as part of the search results.
Released	Select to include production updates that are in a Released status as part of the search results.
Firmed	Select to include production updates that are in a Firmed status as part of the search results.
In Process	Select to include production updates that are in an In Process status as part of the search results.

No Open Pegs

Select to include updates to orders that are not pegged to unfulfilled demand.

Pegging**Open Pegs**

Select to include updates to production orders in the search results that are pegged to unfulfilled demand.

No Open Pegs

Select to include updates to orders that are not pegged to unfulfilled demand.

Status**Processed**

Select to include updates that were previously approved and processed in the returned search results. These updates and the production data have been updated with the recommended changes from PeopleSoft Supply Planning.

Within Tolerance and Outside Tolerance

Select to view production order reschedules that are within and outside tolerance. If you select the options, the system displays any updates that fall within the schedule in and out of tolerances that are defined for the items selected. The reschedule in factor sets the tolerance for updates to move an order to an earlier date.

The reschedule out factor sets the tolerance for updates to move an order to a later date. PeopleSoft Supply Planning uses these factors to determine how orders within tolerance are processed by the Post Updates process. Orders within tolerance can be automatically approved, marked as a valid change pending approval, considered an exception, or ignored all together.

Planned Order Violations**Violations**

Select an option for processing planned production orders. Values are:

- *Exclude Violated:* Excludes planned production with violations.
- *Only Violated:* Includes only planned production with violations.
- *Both:* All planned production.

Approve Production Updates - Production Messages Page

Use the Approve Production Updates - Production Messages page (PL_PR_MSG_SUM_SPL) to review and approve the production control updates that you want to apply to PeopleSoft Production Management.

Navigation

Supply Planning > Commit Plan > Production Control > Approve Production Updates > Production Messages

When this page initially appears, it includes all of the updates that meet the selection criteria. You can view more information pertaining to the update by selecting the different tabs—Details, Quantity/Status, Flags, and Inventory Pegging, —within the page.



Click the Approve All button or link to approve all of the updates.



Click this Reset Approval button or link to clear all of the updates that have been approved.

Approved

Select this check box—next to an individual update—to approve that update.

Production Status

Select the production status and then click the Set Status button to reset the Status field for all of the unprocessed planned production updates that appear on this page. Values are:

- *Entered.*
- *Firmed.*
- *Released.*

Reset Processed

Click this button to change any update which currently has a processed status of *Error* or *In Process* to a status of *Not Processed*.

If the Apply Planning Message COBOL process fails, you can use this functionality to resubmit those updates for reprocessing.

Applying Production Control Updates

This topic discusses how to apply production control updates.

Page Used to Apply Production Control Updates

Page Name	Definition Name	Usage
Apply Production Updates - Apply Planning Messages Page	SF_PRDN_PLN_REQ	Initiate the Apply Planning Messages COBOL process to process the production control updates that you have approved. This process applies the updates so that PeopleSoft Production Management can act on the suggestions made by PeopleSoft Supply Planning.

Apply Production Updates - Apply Planning Messages Page

Use the Apply Production Updates - Apply Planning Messages page (SF_PRDN_PLN_REQ) to initiate the Apply Planning Messages COBOL process to process the production control updates that you have approved.

This process applies the updates so that PeopleSoft Production Management can act on the suggestions made by PeopleSoft Supply Planning.

Navigation

Supply Planning > Commit Plan > Production Control > Apply Production Updates

Production Selection

Process Production IDs	Select this check box to apply messages for production IDs.
Process Production Schedules	Select this check box to apply messages for production schedules.

Production Message Options

Convert Planned Production	Select this check box to convert planned production into production IDs and production schedules.
Apply Production Changes	Select this check box to apply production change messages to existing production IDs and production schedules.

Committing PeopleSoft Purchasing Updates

Understanding PeopleSoft Purchasing Updates Business Process

When you run the Post Updates process (PL_POST), it generates purchasing recommendations, updates, and post errors. You can review, analyze, approve, and apply those purchasing updates to PeopleSoft Purchasing.

PeopleSoft Production Management and PeopleSoft Supply Planning write their requested POs to a staging area that is scanned by the PO Stage Load (purchase order stage load) process (PO_POSTAGE). This process writes the inputs to a temporary staging area, PO Staging tables, in preparation for sourcing to a PO.

You can manage the PeopleSoft Purchasing updates from PeopleSoft Supply Planning after you run the Post Updates process.

To process PeopleSoft Purchasing updates:

1. Review the errors that occurred from the Post Updates process using the Review Purchasing Post Errors component.

When you run the Post Updates process and the system finds errors, the system generates error messages, because a change in the purchasing data occurred since you ran the Post Updates process, or because a violation of a business rule occurred, such as an invalid calendar date.

2. (Optional) Review and approve the recommended PeopleSoft Purchasing updates using the Approve Purchasing Updates component.

When PeopleSoft Supply Planning suggests an adjustment to an existing PO, or suggests that you create a PO, an update is placed on the Approve Purchasing Update component. This occurs after you run the Post Updates process.

Use this component to approve the PeopleSoft Purchasing updates manually. You can automatically approve all of the changes during the Post Updates process.

3. Apply the approved PO updates to PeopleSoft Purchasing.
 - a. Initiate the PO Stage Load process using the Request PO Stage Load component.

This process searches for PO requests. PO requests are loaded into the PO stage tables.
 - b. (Optional) Review the results of the PO stage tables using the Sourcing Workbench component.

You should review the contents of the staging tables before and after each step in the sourcing process.
 - c. Initiate the PO Calculations process (PO_POCALC) using the Calculate Purchase Orders component.

- d. (Optional) Review the results of the PO stage tables using the Sourcing Workbench component.
- e. Initiate the Create Purchase Orders process (PO_POCREATE) using the Create Purchase Orders component.

Note: You can use the PO Auto Sourcing component to initiate the PO Stage Load, PO Calculations, and Create Purchase Orders processes in sequence on the same set of records, instead of initiating the processes individually.

- f. (Optional) Review the results of the PO stage tables using the Sourcing Workbench component.
4. Apply the approved PO updates to PeopleSoft Purchasing.
 - a. Initiate the PO Stage Load process using the Request PO Stage Load component.

This process searches for PO change requests. PO change requests are loaded into the change request stage tables.
 - b. Review and approve the PO change requests using the Review Change Requests component.
 - c. Initiate the Change Purchase Order process (PO_POCHNG) using the Change Purchase Orders component.

Using PeopleSoft Purchasing, you can manage these types of updates from PeopleSoft Supply Planning:

- Creation of purchase orders.
- Cancellation, reschedule, and quantity change of purchase orders.
- Frozen purchase Orders.

Related Links

[Applying PeopleSoft Purchasing Updates Recommending New POs](#)

[Applying PeopleSoft Purchasing Updates Recommending Changes to POs](#)

Prerequisites

Before you begin to review and apply purchase updates, you must:

- Generate the supply plan.
- Run the Post Updates process.

Related Links

[Understanding the Plan Generation Process](#)

[Understanding PeopleSoft Supply Planning Planned Order Numbering](#)

Reviewing PeopleSoft Purchasing Post Errors

This topic discusses how to review PeopleSoft Purchasing post error details.

Pages Used to Review PeopleSoft Purchasing Post Errors

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Review Purchasing Post Errors - Search Page	SPL_PO_EXCPT_SRCH	Define the search criteria for the PeopleSoft Purchasing post errors that you want to review.
Review Purchasing Post Errors - Errors Page	SPL_PO_EXCEPTION	View the details of a PeopleSoft Purchasing post error that occurred during the Post Updates process.

Review Purchasing Post Errors - Search Page

Use the Review Purchasing Post Errors - Search page (SPL_PO_EXCPT_SRCH) to define the search criteria for the PeopleSoft Purchasing post errors that you want to review.

Navigation

Supply Planning > Commit Plan > Purchasing > Review Purchasing Post Errors > Search

Select the search criteria for the PeopleSoft Purchasing post errors that you want to view. Select a plan unit group or business unit; and an error type. To narrow the error selection, you can select an item ID and a planner code.

Error Type

Cancel/Delete/Closed

Select this check box to view cancellation, deletion, and closure errors that occurred in PeopleSoft Purchasing and are associated with the search criteria that you selected.

Order Changed

Select this check box to view PO change errors associated with the search criteria that you selected. The order in PeopleSoft Purchasing changes after being loaded into PeopleSoft Supply Planning.

Tolerance

Select this check box to view within tolerance errors that are associated with the search criteria that you selected.

When you run the Post Updates process, you can decide how the system should handle the updates pertaining to the reschedule of POs that are within tolerance. You can post an error if the reschedule update is invalid.

See [Posting PeopleSoft Supply Planning Updates to the Transaction System](#).

Quantity Changed	Select this check box to view quantity change errors associated with the search criteria that you selected.
Previously Converted	Select this check box to view previously converted errors that are associated with the search criteria that you selected.
Open Pegs	Select to include updates to orders that are pegged to unfulfilled demand.

Review Purchasing Post Errors - Errors Page

Use the Review Purchasing Post Errors - Errors page to review errors.

Navigation

Supply Planning >Commit Plan >Purchasing >Review Purchasing Post Errors >When the page initially appears, all of the post errors that meet the selection criteria appear on the page. You can view more information pertaining to the error by selecting the different tabs—Details, Dates/Times, and Inventory Pegging, —within the page.

Message Text	The system displays error message text associated with each post error message. Messages are: <ul style="list-style-type: none"> • <i>Cannot be Applied Due to Cancel, Delete, Close, Ship, or Hold.</i> • <i>Cannot be Applied Due to Order Change.</i> • <i>Order was Rescheduled Within Tolerance.</i> • <i>Quantity Changed in Planning Engine.</i> • <i>Cannot be Applied Due to PO Quantity is less than received quantity.</i>
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Approving PeopleSoft Purchasing Updates

This topic discusses how to review and approve the PeopleSoft Purchasing updates.

Pages Used to Approve PeopleSoft Purchasing Updates

Page Name	Definition Name	Usage
<u>Approve Purchasing Updates - Search Page</u>	SPL_PO_MSG_SRCH	Define the search criteria for the PeopleSoft Purchasing updates that you want to review.
<u>Approve Purchasing Updates - Purchasing Messages Page</u>	SPL_PO_MSG_SUM	Review and approve the PeopleSoft Purchasing updates that you want to apply to PeopleSoft Purchasing.

Approve Purchasing Updates - Search Page

Use the Approve Purchasing Updates - Search page (SPL_PO_MSG_SRCH) to define the search criteria for the PeopleSoft Purchasing updates that you want to review.

Navigation

Supply Planning > Commit Plan > Purchasing > Approve Purchasing Updates > Search

The Search page enables you to define selection criteria on which to base the search purchasing information. You can base searches on a specific inventory unit (PeopleSoft Inventory business unit) or a plan unit group. You must select at least one message type and at least one message and one approval status.

If a default value planning instance has been associated with a user, the system automatically displays the business unit group assigned to that planning instance. If there is not a default business unit group, the system uses the business unit defined as the user's preference.

Other selection criteria include, for example, category, supplier SetID, and item group. You can also limit the search to specific purchase start dates and due dates. The retrieved results for this type of search provides you a range of purchasing updates.

Click the Search button to retrieve purchasing updates that match the selection criteria. The system displays a message if it does not find purchasing updates based on the criteria that you enter.

To save the selection criteria that you define, enter a name for the criteria in the Use Saved Search field and click the Save Search Criteria button at the bottom of the page. After saving search criteria, you can select it from the list of values. You can also delete saved searches by selecting the saved search and then clicking the Delete Search Criteria button.

Message Type

Planned	Select to include planned purchasing updates in the search results.
Reschedule In	Select to include purchasing updates in the search results. These are changes that have been rescheduled to an earlier date.
Qty Change (quantity change)	Select to include purchase order quantity changes in the search results. These are purchasing updates where the quantity has changed through the PeopleSoft Supply Planning Purchase Order Refine page.
Canceled	Select to include canceled purchasing updates in the search results. Canceled updates are those associated with purchase orders.
Reschedule Out (quantity change)	Select to include purchasing updates in the search results that have been rescheduled to a later date.

Supplier Scheduled Items

Include Schedule Items

Select to include supplier-scheduled items in the search results. Supplier schedules show the time-phased quantities that the scheduler proposes.

Exclude Schedule Items

Select to exclude supplier-scheduled items from the search results.

Only Show Schedule Items

Select to include only supplier-scheduled items in the search results

Strategic Sourcing Events

Include Planned Items

Select to include planned items from PeopleSoft Strategic Sourcing events in the search results. Planned items are those items that you procure through PeopleSoft Strategic Sourcing.

Exclude Planned Items

Select to exclude planned sourcing items from the search results.

Only Show Planned Items

Select to include only planned sourcing items in the search results.

Approval

Unapproved

Select to view updates that were not approved in previous review sessions. The system selects this check box by default.

Approved

Select to view updates that were previously approved but not processed.

Planning Status

Expedite

Select this check box to include updates in the search results that are required before the planning time fence.

Accepted

Select to include updates that are between the planning time fence and the action message cutoff fence.

Cutoff

Select to include updates in the search results for items that have updates beyond the action message cutoff fence defined for the item.

Status

Processed

Select to include updates in the search results that were previously approved and processed. These messages and the purchasing data have been updated with PeopleSoft Supply Planning's recommended changes.

Within Tolerance and Outside Tolerance

Select to view purchase order reschedules that are within and outside tolerance. If you select the options, the system displays any updates that fall within the schedule in and out of tolerances that are defined for the items selected. The reschedule in factor sets the tolerance for updates to move an order to an earlier date.

The reschedule out factor sets the tolerance for updates to move an order to a later date. PeopleSoft Supply Planning uses these factors to determine how orders within tolerance are processed by the Post Updates process. Orders within tolerance can be automatically approved, marked as a valid change pending approval, considered an exception, or ignored all together.

Purchase order updates that fall outside of the tolerance range appear on the Approve Purchasing Updates - Message Summary page. Selecting the Tolerance check box enables you to view orders on that page that fall within tolerance.

Staged

Select to include purchasing updates in the search results that are in staged tables.

Pegging**Open Pegs**

Select to include updates to orders in the search results that are pegged to unfulfilled demand.

No Open Pegs

Select to include purchase updates to orders that are not pegged to unfulfilled demand.

Approve Purchasing Updates - Purchasing Messages Page

Use the Approve Purchasing Updates - Summary page (SPL_PO_MSG_SUM) to review and approve the PeopleSoft Purchasing updates that you want to apply to PeopleSoft Purchasing.

Navigation

Supply Planning > Commit Plan > Purchasing > Approve Purchasing Updates > Summary

When this page initially appears, it includes all of the updates that meet the selection criteria. You can view more information pertaining to the update by selecting the different tabs— Details, Dates/Times, Quantity/supplier, Status, Unit/Buyer, Strategic Sourcing, and Inventory Pegging, —within the page.



Click the Approve All button or link to approve all of the updates that appear.



Click the Reset Approval button or link to clear all of the updates that are already approved.

Approved

Select the check box that is next to an individual update to approve the update.

Applying PeopleSoft Purchasing Updates Recommending New POs

This topic discusses how to run the PO Stage Load process.

Pages Used to Apply PeopleSoft Purchasing Updates Recommending New POs

Page Name	Definition Name	Usage
<u>Request PO Stage Load - PO Stage Load Page</u>	RUN_PO_POSTAGE	Initiate the PO Stage Load process.
Calculate Purchase Orders - Run Controls Page	RUN_PO_POCALC1	Enter process parameters to run the PO Calculations process and initiate the PO Calculations process. "Run Controls Page" (PeopleSoft FSCM 9.2: Purchasing)
Calculate Purchase Orders - Select Criteria Page	RUN_PO_POCALC2	Enter the selection criteria for the PO Calculations process. "Run Controls Page" (PeopleSoft FSCM 9.2: Purchasing)
Create Purchase Orders - Create PO Page	RUN_PO_POCREATE	Enter selection criteria and initiate the Create Purchase Orders process. "Create PO Page" (PeopleSoft FSCM 9.2: Purchasing)
Sourcing Workbench - Selection Criteria Page	PO_SRC_CRITERIA	Select which stage rows to view on the Sourcing Workbench - Selected Items page. "Sourcing Workbench - Sourcing Page" (PeopleSoft FSCM 9.2: Purchasing)
Sourcing Workbench - Selected Items Page	PO_SRC_ANALYSIS	View the rows of data on the PO_ITM_STG table and access pages to change the recommended supplier, quantities sourced to each supplier, or correct errors. "Sourcing Workbench - Sourcing Page" (PeopleSoft FSCM 9.2: Purchasing)

Page Name	Definition Name	Usage
PO Auto Sourcing - Objectives Page	RUN_PO_AUTOSRC	<p>(Optional) Run multiple PeopleSoft Purchasing sourcing processes in sequence on the same set of records.</p> <p>Use this process to run the PO Stage Load, PO Calculations, and Create Purchase Order processes in sequential order all at one time versus initiating these processes individually.</p> <p>"PO Auto Sourcing - Objectives Page" (PeopleSoft FSCM 9.2: Purchasing)</p>

Request PO Stage Load - PO Stage Load Page

Use the Request PO Stage Load - PO Stage Load page (RUN_PO_POSTAGE) to initiate the PO Stage Load process.

Navigation

Supply Planning > Commit Plan > Purchasing > Request PO Stage Load > PO Stage Load

Process Planning Requests

Select to process purchase requests from PeopleSoft Supply Planning. If this check box is deselected, the system ignores purchase requests from these sources.

Group POs by Item - Planning (group purchase orders by item - planning)

Select to consolidate the purchase orders into one purchase order per supplier, per item. This can be wanted if the purchase orders are very large. If this check box is deselected, you can generate purchase orders with multiple lines for the same supplier. This check box is used in conjunction with the Process Planning Requests check box.

Purchase Order Type

Select to indicate the type of requests that you want to load. If you do not select a value, both types are loaded. To use this option, you must select Process Planning Requests. Values are:

- *E* (existing orders): Changes to an existing purchase order.
- *N* (planned order): Generate new planned orders.

Option

Select a date option on which to base the PO Stage Load process. Depending on your selection, the Operand, Nbr Days (number of days), and Date fields become available. Select No Selection by Date if you do not want to use dates.

Process Production Requests

Select to process production requests.

Group POs by Item-Production

Select to consolidate purchase orders when you run the PO Stage Load process.

Applying PeopleSoft Purchasing Updates Recommending Changes to POs

This topic discusses how to change POs.

Pages Used to Apply PeopleSoft Purchasing Updates Recommending Changes to POs

Page Name	Definition Name	Usage
<u>Request PO Stage Load - PO Stage Load Page</u>	RUN_PO_POSTAGE	Initiate the PO Stage Load process.
Review Change Requests - Selection Criteria Page	CHNG_RQST_SELECT	Enter the selection criteria for the change orders that you want to view on the Change Ord Rqsts page. " Approve Change Requests - Selection Criteria Page" (PeopleSoft FSCM 9.2: Purchasing)
Review Change Requests - Change Ord Rqsts Page	CHNG_ORD_LOOKUP	Review and approve change requests. "Approve Change Requests Page" (PeopleSoft FSCM 9.2: Purchasing)
<u>Change Purchase Orders - PO Changes Page</u>	RUN_PO_POCHNG	Initiate the Change Purchase Order process.

Change Purchase Orders - PO Changes Page

Use the Change Purchase Orders - PO Changes page (RUN_PO_POCHNG) to initiate the Change Purchase Order process.

Navigation

Supply Planning > Commit Plan > Purchasing > Change Purchase Orders > PO Changes

Source

Select a particular source for the PO changes. The source to use for PO changes initiated from PeopleSoft Supply Planning is:
PLN: (planning system).

Committing PeopleSoft Order Management Updates

Understanding the PeopleSoft Order Management Updates Business Process

When you run the Post Updates process (PL_POST), it generates order management recommendations and post errors. You can review and manually apply those order management updates to PeopleSoft Order Management.

You can manage the PeopleSoft Order Management updates from PeopleSoft Supply Planning after you run the Post Updates process.

To process PeopleSoft Order Management updates:

1. Review the errors that occurred from the Post Updates process using the Review Post Errors component.

When you run the Post Updates process, the system generates error messages. The Post Updates process generates exception messages when a change in the planning instance occurs that cannot be directly applied in PeopleSoft Order Management. Additionally, net change conditions (when, for example, a sales order is modified after being extracted into PeopleSoft Supply Planning) also appear as errors.

2. Review the recommended PeopleSoft Order Management updates using the Review Updates component.

During the Post Updates process, the system compares the exported sales order from PeopleSoft Supply Planning with the actual sales orders in PeopleSoft Order Management. Based on material and capacity constraints, PeopleSoft Supply Planning suggests rescheduling ship dates for orders that cannot be shipped on the customer-requested ship date or the scheduled ship date. You can direct rescheduling of demand by establishing demand priorities, freezing orders within the planning instance, and varying solver reschedule options.

3. Apply the PeopleSoft Order Management updates manually in PeopleSoft Order Management.

Use the inquiry pages in PeopleSoft Supply Planning to review rescheduled shipment dates along with manual changes that a planner may have made in a planning instance. The Review Updates pages are used for inquiry only; you must apply the suggested updates manually in PeopleSoft Order Management.

Use PeopleSoft Order Management to manage these types of updates from PeopleSoft Supply Planning:

- Reschedule of sales orders or quotes.
- Modifications in quantities and status on sales orders or quotes made by the planner.

- Modifications to buying agreements.

Prerequisites

Before you begin to review and apply PeopleSoft Order Management updates, you must:

- Generate the supply plan.
- Run the Post Updates process.

Related Links

[Understanding the Plan Generation Process](#)

[Understanding PeopleSoft Supply Planning Planned Order Numbering](#)

Reviewing PeopleSoft Order Management Post Errors

This topic lists a common element and discusses how to review PeopleSoft Order Management post errors.

Pages Used to Review PeopleSoft Order Management Post Errors

Page Name	Definition Name	Usage
Review Post Errors - Search Page	PL_OM_EXCPT_SRCH	Define the search criteria for the PeopleSoft Order Management post errors that you want to review.
Review Post Errors - Sales Orders/Quotes Page	PL_SO_EXCEPTION	Review the PeopleSoft Order Management post errors that pertain to sales orders or quotes that occurred during the Post Updates process.
Review Post Errors - Buying Agreements Page	PL_BA_EXCEPTION	Review the PeopleSoft Order Management post errors that pertain to buying agreements that occurred during the Post Updates process.

Common Element Used in This Section

Message Text

The system displays error message text associated with each post error message. Messages are:

- *Cannot be Applied Due to Cancel, Delete, Close, Ship, or Hold.*
- *Cannot be Applied Due to Order Change.*
- *Order was Rescheduled Within Tolerance.*

- *Quantity Changed in Planning Engine.*
- *Order was Canceled by the Planning Engine.*

Review Post Errors - Search Page

Use the Review Post Errors - Search page (PL_OM_EXCPT_SRCH) to define the search criteria for the PeopleSoft Order Management post errors that you want to review.

Navigation

Supply Planning > Commit Plan > Order Management > Review Post Errors > Search

Select the search criteria for the PeopleSoft Order Management post errors that you want to view. Select a plan unit group or ship from business unit, order type, and at least one error type.

Error Type

Cancel/Delete/Closed

Select to view cancellation, deletion, and closure errors that occurred in PeopleSoft Order Management and are associated with the search criteria that you selected.

Order Changed

Select to view order change errors that are associated with the search criteria that you selected. The order in PeopleSoft Order Management changes after being loaded in PeopleSoft Supply Planning.

Within Tolerance

Select to view within tolerance errors that are associated with the search criteria that you selected.

When you run the Post Updates process, you can decide how the system should handle the updates pertaining to the reschedule of sales orders, quotes, and buying agreements that are within tolerance. One of the options is to post an error if the reschedule update is invalid.

Quantity Changed

Select to view quantity change errors that are associated with the search criteria that you selected.

Quantity change errors occur if changes are made to the order quantity in the planning engine.

Planning Canceled

Select to view all of the orders that were manually canceled within PeopleSoft Supply Planning.

Open Pegs

Select to include updates to orders that are pegged to unfulfilled demand.

Review Post Errors - Sales Orders/Quotes Page

Use the Review Post Errors - Sales Orders/Quotes page (PL_SO_EXCEPTION) to review the PeopleSoft Order Management post errors that pertain to sales orders or quotes that occurred during the Post Updates process.

Navigation

Supply Planning > Commit Plan > Order Management > Review Post Errors > Sales Orders/Quotes

When this page initially appears, all of the post errors that meet the selection criteria appear on the page. You can view more information pertaining to the error by selecting the different tabs—Exception Details, and Dates, —on the page.

Review Post Errors - Buying Agreements Page

Use the Buying Agreements page (PL_BUYING_AGREEMNT) to review and maintain parameters for buying agreements, such as releases, order quantities, and expected shipment dates.

Navigation

Supply Planning > Refine Plan > Order Management > Buying Agreements

When this page initially appears, all of the post errors that meet the selection criteria appear on the page. You can view more information pertaining to the error by selecting the different tabs—Exception Details and Dates—on the page.

Reviewing PeopleSoft Order Management Updates

This topic discusses how to review PeopleSoft Order Management Updates.

Pages Used to Review PeopleSoft Order Management Updates

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Review Updates - Search Page</u>	PL_OM_MSG_SRCH	Define the search criteria for the PeopleSoft Order Management updates that you want to review.
<u>Review Updates - Sales Orders/Quotes Page</u>	PL_SO_MESS_SUM	View the PeopleSoft Order Management sales orders and quotes updates that you may want to apply to PeopleSoft Order Management.
<u>Review Updates - Buying Agreements Page</u>	PL_BA_OMMSG_SUM	View the PeopleSoft Order Management buying agreement updates that you may want to apply to PeopleSoft Order Management.

Review Updates - Search Page

Use the Review Updates - Search page (PL_OM_MSG_SRCH) to define the search criteria for the PeopleSoft Order Management updates that you want to review.

Navigation

Supply Planning > Commit Plan > Order Management > Review Updates > Search

Select the search criteria for the PeopleSoft Order Management updates that you want to review. Select a plan unit group or ship from business unit. You must also select at least one order type and status. To narrow the update selection, you can select any of the other search fields: Ship To, Product ID, and OM Unit (PeopleSoft Order Management business unit).

Status

Expedite	Select to review updates that are required before the planning time fence.
Accepted	Select to review updates that are between the planning time fence and the action message cutoff fence.
Cutoff	Select to review updates beyond the action message cutoff fence that is defined for the item.
Tolerance	<p>Select to view reschedules that are within tolerance. If you select this check box, the system displays any updates that fall within the schedule in and out tolerances that are defined for the items that you selected. The Reschedule In Factor sets the tolerance for updates to move an order to an earlier date.</p> <p>The Reschedule Out Factor sets the tolerance for updates to move an order to a later date. PeopleSoft Supply Planning uses these factors to determine how orders within tolerance are processed by the Post Updates process.</p> <p>Order updates that fall outside of the tolerance range always appear on the Review Updates - Sales Orders/Quotes or Buying Agreements pages. If you select Tolerance, you can view orders that fall within tolerance on that page as well.</p>

Review Updates - Sales Orders/Quotes Page

Use the Review Updates - Sales Orders/Quotes page (PL_SO_MESS_SUM) to view the PeopleSoft Order Management sales orders and quotes updates that you may want to apply to PeopleSoft Order Management.

Navigation

Supply Planning > Commit Plan > Order Management > Review Updates > Sales Orders/Quotes

When this page initially appears, all of the sales orders and quotes updates that meet the selection criteria appear on the page. You can view more information pertaining to the updates by selecting the different tabs—Details, Status, Quantity, Customer, and Inventory Pegging, —on the page.

Review Updates - Buying Agreements Page

Use the Review Updates - Buying Agreements page (PL_BA_OMMSG_SUM) to view the PeopleSoft Order Management buying agreement updates that you may want to apply to PeopleSoft Order Management.

Navigation

Supply Planning > Commit Plan > Order Management > Review Updates > Buying Agreements

When this page initially appears, all of the buying agreement updates that meet the selection criteria appear on the page. You can view more information pertaining to the updates by selecting the different tabs—Details, Status, Quantity, and Customer—on the page.

Appendix A

PeopleSoft Supply Planning Reports

PeopleSoft Supply Planning Reports: Reports A to Z

This table lists the PeopleSoft Supply Planning reports, sorted alphanumerically by report ID. The reports listed are all Structured Query Reports (SQRs). If you need more information about a report, refer to the links at the end of this troubleshooting.

Report ID and Report Name	Description	Navigation	Run Control Page
PLS2002 Planning Report	Define the Planning report print options and filter criteria, and generate a summarized or detail Planning report.	Supply Planning > Solve Plan > Reports > Planning Report	PL_PLANNING_REPORT
PLS3001 Planning Data Inconsistency	Identify items to be planned and validate the items that are currently planned.	Supply Planning > Create Plan > Inconsistency Report	RUN_PLS3000
PLS4002 Planning Useup	Review discontinued items, their useup dates, and their substitute items.	Supply Planning > Commit Plan > Planning > Planning Useup Report	PL_USEUP_RPT
PLS4010 Planned Slow Moving Inventory	Generate a report for a specified planning instance that highlights items with on-hand inventory and little or no demand.	Supply Planning > Solve Plan > Reports > Planned Slow Moving Inventory Report	PL_SLOWMOVG_REQ
PLS4011 Planning Updates	Review the new and changed orders generated by the Post Update process for PeopleSoft Purchasing, Production, Inventory, and Order Management.	Supply Planning > Commit Plan > Planning > Planning Updates Report	PL_MESS_RPT
PLS4020 Excess Stock	Generate a report listing the quantity and value of on-hand stock levels that are above the excess and safety stock levels at period end.	Supply Planning > Solve Plan > Reports > Excess Stock	PL_XSTOCK_REQ
PLS4030 Projected Stock Out	Generate a report that calculates the date at which an inventory level will fall to zero (or near zero).	Supply Planning > Solve Plan > Reports > Projected Stock Out	PL_STOCKOUT_REQ

Report ID and Report Name	Description	Navigation	Run Control Page
PLS4040 Planning Reschedule	Generate a report listing all reschedules and cancellations of scheduled production, purchase orders, transfers, sales orders and quotes, buying agreements, extra demand, and stock requests.	Supply Planning > Solve Plan > Reports > Planning Reschedule	PL_RESCHED_REQ
PLS4050 Detail Resources	Generate a report listing the number of machines, crews, and tools used in a production process.	Supply Planning > Solve Plan > Reports > Detail Resources	SPL_DETAIL_RES_REQ
SPL_CAPX_RPT Planning Capacity	Generate a report with the capacity usage for work center resources across a production period.	Supply Planning > Solve Plan > Reports > Capacity	PL_CAPACITY_REPORT

Related Links

[Verifying PeopleSoft Supply Planning Data](#)

[Creating Supply and Demand Analysis Reports](#)

[Creating Planning Reports](#)

[Creating PeopleSoft Supply Planning Updates Reports](#)

[Displaying Item Useup Information](#)

[Creating PeopleSoft Supply Planning Capacity Reports](#)