

Oracle® Advanced Planning Command Center

User's Guide

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Primary Author: Margot Murray

Contributing Author: Greg Watkins

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Oracle Advanced Planning Command Center User's Guide, Release 12.2

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle Advanced Planning Command Center User's Guide*.

Casual User and Implementer

See Related Information Sources on page xvi for more Oracle E-Business Suite product information.

Documentation Accessibility

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Structure

- 1 Advanced Planning Command Center Overview
- 2 Managing Scenarios
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- 4 Understanding the Advanced Planning Analytical Framework
- 5 Using the Supply Chain Analyst Dashboard
- 6 Using the Sales and Operations Planning Analyst Dashboard
- 7 Using the Supply Chain Risk Management Dashboard
- 8 Using the Service Parts Planning Dashboard
- 9 Understanding the Trade Analysis Dashboard
- A BPEL Processes

Related Information Sources

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

Users who are granted the Integration Analyst role can navigate to the Oracle Integration Repository through the Integration Repository responsibility. Users who have the Integration Developer role or the Integration Administrator role can access the Oracle Integration Repository through the Integrated SOA Gateway responsibility.

Oracle Advanced Supply Chain Planning Implementation and User's Guide

This guide describes Internet-based planning solutions that decide when and where supplies, such as inventory, purchase orders, and work orders, should be deployed within an extended supply chain.

Oracle Collaborative Planning Implementation and User's Guide

This guide describes the information that you need to understand and use Oracle Collaborative Planning to communicate, plan, and optimize supply and demand information for trading partners across the supply chain.

Oracle Demand Planning User's Guide

This guide describes how to use Oracle Demand Planning, an Internet-based solution for creating and managing forecasts.

Oracle Global Order Promising Implementation and User's Guide

This guide describes how to use Oracle Global Order Promising for sophisticated, fast, accurate, and flexible order promising.

Oracle Inventory Optimization User's Guide

This guide describes the comprehensive Internet-based inventory planning solution that enables you to determine when and where to hold your inventories across the supply chain to achieve the desired customer service levels.

Oracle Order Management User's Guide

This guide describes the necessary information that you need to use and comprehend managing your orders.

Oracle Production Scheduling Implementation Guide

This guide describes how to use Production Scheduling to create detailed finite capacity and materially constrained optimized production schedules to drive shop floor operations and material planning.

Oracle Rapid Planning Implementation and User's Guide

This guide describes how you can copy and regenerate plans to create fast, what-if simulations, run alternative scenarios, and compare plan metrics to help you select the best solution for your scenario.

Oracle Service Parts Planning Implementation and User's Guide

Oracle Service Parts Planning is used by repair service operations to ensure that the right parts are available at the right locations and at the right times, in usable condition. It enables planners to forecast and manage the distribution of individual parts in the most efficient manner possible.

Oracle Strategic Network Optimization Implementation Guide

This guide describes how to use Strategic Network Optimization to model and optimize your supply chain network, from obtaining raw materials through delivering end products.

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

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

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle E-Business Suite data, you risk destroying the integrity of

your data and you lose the ability to audit changes to your data.

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

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

Advanced Planning Command Center Overview

This chapter covers the following topics:

- Advanced Planning Command Center Overview
- Overview of Scenarios
- Overview of Web Services
- Overview of Dashboards
- Overview of Collaborative Workspaces
- Executive Summary Report as a Portlet
- Work List
- Data Security

Advanced Planning Command Center Overview

Oracle Advanced Planning Command Center unifies all the Advanced Planning applications such as Demand Management, Real-Time Sales and Operations Planning, Strategic Network Optimization, Advanced Supply Chain Planning, Distribution Requirements Planning, and Inventory Optimization. It provides a unified user interface and a single repository of all data. It is flexible, enabling the user to access data from external supply chain planning applications and make them available for reporting and analysis within a unified user interface based on Oracle Business Intelligence - Enterprise Edition (OBIEE).

Overview of Scenarios

Oracle Advanced Planning Command Center enables users to define multiple what-if planning scenarios that simulate different business parameters. Users can associate the scenarios to underlying Predefined Business Process Execution Language (BPXL)

processes and automate the execution, orchestration, and monitoring of the scenarios. It provides extensive plan and scenario comparison capabilities, and facilitates the collaboration required for inter-organizational and interdisciplinary planning processes such as Sales and Operations Planning.

See Understanding Scenario Planning, page 2-1

Overview of Web Services

Oracle Advanced Planning Command Center provides access to an extensive list of Web services that decompose Oracle Advanced Planning capabilities into atomic functional pieces. BPEL processes leverage these Web services and they can be used to automate and orchestrate sales and operations planning and supply chain planning business flows.

See Web Services, page 3-4

Overview of Dashboards

Users can view plan outputs using predefined, role-based dashboards with seeded reports that expose a collection of more than 200 facts. These facts span the entire planning spectrum and can be analyzed across more than 20 dimensional hierarchies. These dashboards can be customized at the user level, which can also expose custom OBIEE reports. Predefined dashboards are provided to support the sales and operations planning and the supply-chain analysis business processes.

See Understanding the Supply Chain Analyst Dashboard, page 5-1 and Using the Sales and Operations Planning Dashboard, page 6-1.

Overview of Collaborative Workspaces

APCC incorporates a collaboration platform for a variety of roles, such as demand planners, supply chain planners, inventory managers, that seamlessly integrates with existing APS applications. It gives planners with an easier way to record and share various key inputs, assumptions & decisions that affect their planning decisions with other members of the organization.

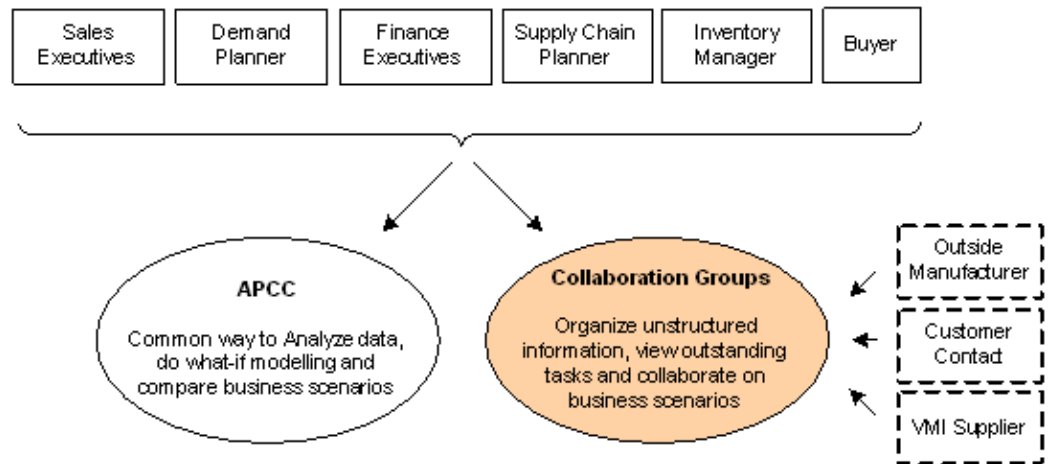
Collaborative workspaces provide:

1. An ability to quickly form ad-hoc, virtual groups for specific planning tasks.
2. A way to share structured and unstructured content that relates to that group.
3. A single, flexible portal-like user interface that brings together specific components of various planning applications and the collaboration tools that are needed for the group to accomplish that task.

The collaboration is based around a business scenario, that is, a planning scenario, as

defined in Advanced Planning Command Center (APCC) and would enable you to optionally leverage a set of collaboration capabilities around the scenario.

An overview of the collaboration is shown below:



The design enhances the collaboration to create personalized work lists, store documents, group event calendar, to-dos, notes etc. that can be assigned to users, while re-using the concepts of tasks from APCC.

Collaboration Group

During creation of a planning scenario, you have collaboration options with which you can create a collaboration group and also assign application users to this group.

The screenshot shows the 'Edit Scenario' window in the Oracle Advanced Planning Command Center. The window has a blue header with the Oracle logo and the text 'Advanced Planning Command Center'. Below the header, there are tabs for 'Scenarios', 'Scenario Sets', and 'Planning Processes'. The 'Scenarios' tab is selected. The main area contains a form with the following fields: 'Scenario Name' (001-ASCP-GAP), 'Description', 'Owner' (SDASARAT1), 'Access' (Public), and 'Scenario Comment'. To the right of the form, there are fields for 'Valid From' and 'Valid To', and a 'Collaboration Group' section with radio buttons for 'None', 'Create New', and 'Assign to existing group'. The 'Assign to existing group' option is selected. At the bottom left, there are 'Save' and 'Cancel' buttons.

From the Create Scenario window, you can:

- Create a new collaboration group by choosing the Create New option. The name automatically defaults to the Scenario name, but you can change it.
- Assign your scenario to an existing collaboration group by choosing the Assign to existing group option. You can choose a value from a list of values of valid collaboration groups.

- Choose not have any collaboration group created for this scenario by choosing the None option. If the scenario was previously associated with a collaboration group, then you can remove the link to that group.

Note: If you want to add members, you must choose the Create New option.

Collaboration Group Home Page

To access the collaboration home page, select Collaboration Home from the Advanced Planning Scenario Manager responsibility.

Group Space

Group Spaces that are created from APCC are containers for all the collaboration activity that occurs within each group. It is directly tied one-to-one to a scenario and shares all the attributes of that scenario. The name of the scenario becomes the name of the group; the owner of the scenario becomes the moderator of the group.

New group spaces can be created within WebCenter. They are managed by, but are not tied in to, the APCC scenarios. For example, if you delete a group space within WebCenter, it does not delete or update the APCC scenarios.

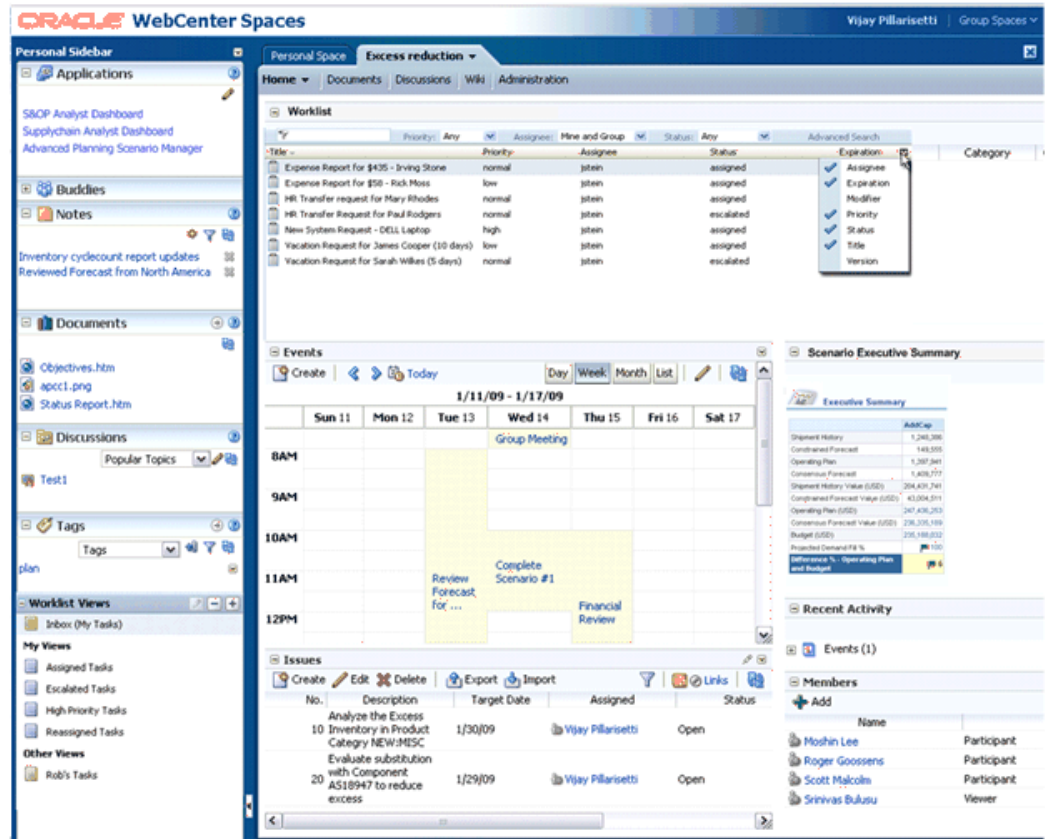
Group Space Template

The seeded default template for the home page includes the following content:

Collaboration Tools	Work list, Group Calendar, Documents, Discussions, Tags, Issues & Notes
Product Content	Executive Summary Report from S&OP Dashboard for that Scenario

You can customize the content to suit your business needs. Following is an example of a custom group space with additional content.

Below is an example of a custom group space with additional content.



Navigation Rules To and From the Collaboration Home Page

When you access the APCC dashboards or the APCC scenario manager application, you go directly to the respective application.

The navigation to and from the collaboration home page follows these basic rules:

From	To	Context
Advanced Planning Scenario Manager	Collaboration Home	None
Collaboration Home (left navigator pane)	S&OP dashboard, SCA dashboard, Advanced Planning Scenario Manager and other applications	None

Collaboration Home (group space application links)	S&OP dashboard, Advanced Planning Scenario Manager and other applications	Scenario context. (If there are multiple scenarios, default the first name in alphabetical order.)
Collaboration Home (group space application links)	SCA dashboard	Plan context (If there are multiple plans, default the first name in alphabetical order.)

Executive Summary Report as a Portlet

Within the S&OP dashboard, the Executive Summary Report is enabled as a portlet. It uses the current group scenario as the input and renders a single scenario view. All the drill-downs from this report to the S&OP dashboard and answers pages in the same browser window, but still keeps the left hand side Navigator of WebCenter intact.

Work List

The work list that is displayed in the Collaboration Group Home page is an amalgamation of all the tasks that flow from different sources for that individual user. This is not necessarily related to the scenario to which this Group corresponds. This work list portlet looks at the BPEL repository as the single source of truth for all tasks. The various sources from where these tasks come are all System tasks originated from APCC Planning Scenarios / BPEL Processes.

The table below shows the relationship between the work list column and the meaning of the APCC attribute:

Work List Column	APCC Attribute Meaning
Title	BPEL Process Name created in Scenario Manager.
Status	Status: Possible values are: Assigned, Deleted, or Suspended.
Identifier	Plan Name
Category	BPEL activity status category, such as In progress, Not started, Error, or Completed."

Creator	Created by
Created	Date Created on

Data Security

For all the portlets that are available in a group space (including the Executive Summary report), only the members have access. The reports from APCC are not available outside the context of a Collaboration group.

Managing Scenarios

Understanding Scenario Planning

The purpose of Scenario Planning is to model business scenarios that use different parts of the supply chain using planning scenarios. A planning scenario represents a what-if business situation that you use to forecast, analyze, and compare to another scenario. Scenario planning enables you to view and analyze your global organization, which provides a holistic view of the problem and improves decision-making processes.

An integrated planning process requires that planners not only effectively model the individual parts of the supply chain but also model the end-to-end business process so that they can monitor and control the process in a structured and methodical way.

Scenario Planning enables you to model your end-to-end business processes and planning scenarios by combining individual planning processes. This enables users to automate, view, monitor, and react to the entire planning flow from one central location.

Using Scenario Planning

Scenario planning uses these components:

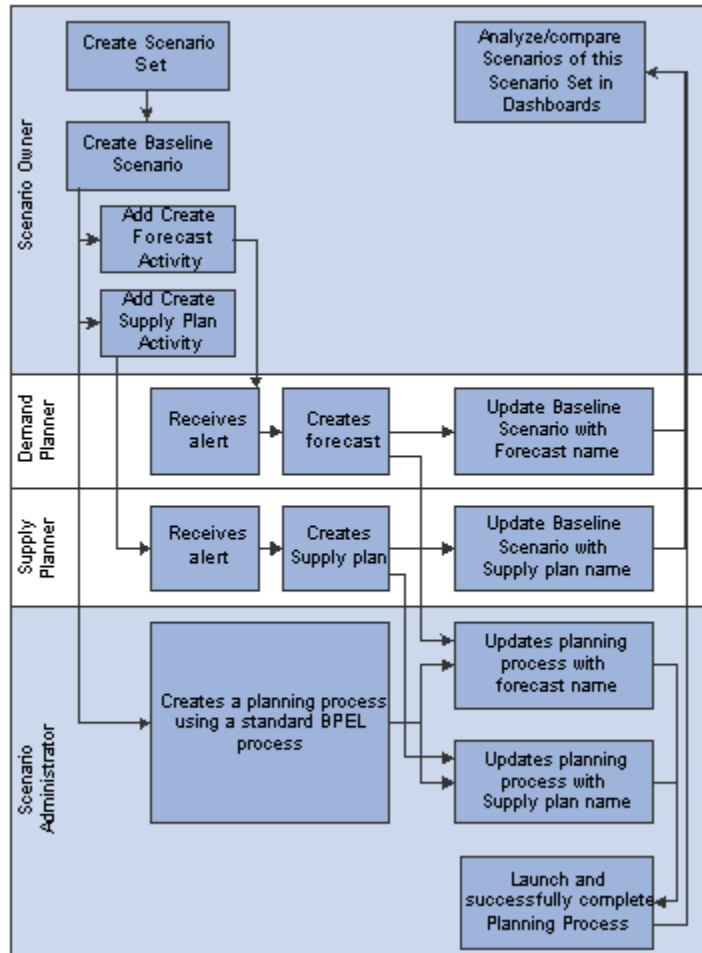
- Planning scenarios.
- Planning scenario sets.
- Planning processes.
- Activities.

Users can create a new scenario and include plans in the scenario. Users can group scenarios into scenario sets. The user can then run the plans manually in the individual application. After running the plans, the user can use the scenario to analyze and compare in the Planning Dashboards.

As an alternative, users can create a planning process using an existing process definition or template. The user copies the process definition or template, links the plans to the process, and then enables the process to automatically launch the plans in the specified sequence.

See **Oracle Advanced Planning Command Center**, Understanding Service-Enablement Planning Processes.

This diagram illustrates how a scenario set can be used by various roles to orchestrate the overall planning process:



Example 1 - Typical Flow of Scenario Planning

A typical user flow of Scenario Planning includes these roles:

- Scenario owner.
- Demand planner.

- Supply planner.

In this example, the scenario owner creates a scenario, which represents a set of business conditions. The baseline scenario is a scenario that subsequent what-if scenarios can be compared to. And a set of related scenarios can be grouped into a scenario set.

The business conditions are embedded in a scenario set, which models a specific business cycle or situation. The scenario owner creates scenario sets.

The scenario owner then creates user-defined activities for the scenario:

- One activity for the demand planner to create a forecast that takes care of the business conditions that this scenario represents.
- One activity for the supply planner to create a supply plan.

The activities are assigned to specific owners with a due date.

The demand planners and the supply planners are immediately notified through a workflow notification message of their open tasks. The demand planner creates and publishes a named forecast (in the demand management application) and the supply planner creates and launches a supply plan (in the supply management application). The planners then update the scenario with the name of the forecast and supply plan.

The scenario is now ready for review or for comparison with other scenarios in the Advanced Planning Command Center dashboards.

Example 2 - Optional Flow of Scenario Planning

An optional user flow of Scenario Planning includes the scenario administrator role.

In this example, it is important to coordinate multiple manual steps such as Collections, Forecasting, Review, Supply Planning, and so on, in a specific sequence. The scenario administrator automates this flow using predefined process flow templates in the Advanced Planning Command Center application.

When a new process is created by means of one of the predefined process flow templates, the system generates a set of activities that represent individual process steps. These individual process steps are called Business Process Execution Language (BPEL) scope nodes. The scenario administrator specifies the inputs for each activity, including the names of the forecasts, plans, and the necessary launch parameters.

The scenario administrator either launches the process or schedules it to start at a specified time in future. This launches each of the process steps in an automated sequence with the appropriate alerts, such as workflow notification messages, to the owners of the activities. The Advanced Planning Command Center provides the administrator with a summary of all the processes and the completion status at any point in time.

When the process completes, the scenario that uses these plans is ready for analysis.

Working with Scenarios

This section provides an overview of the Scenarios page and the scenario states, and discusses how to:

- Access the scenarios page.
- Search for scenarios.
- Create new scenarios.
- Copy scenarios.
- Edit scenarios.
- Archive scenarios.
- Purge scenarios.
- Purge plan facts.

Understanding the Scenarios Page

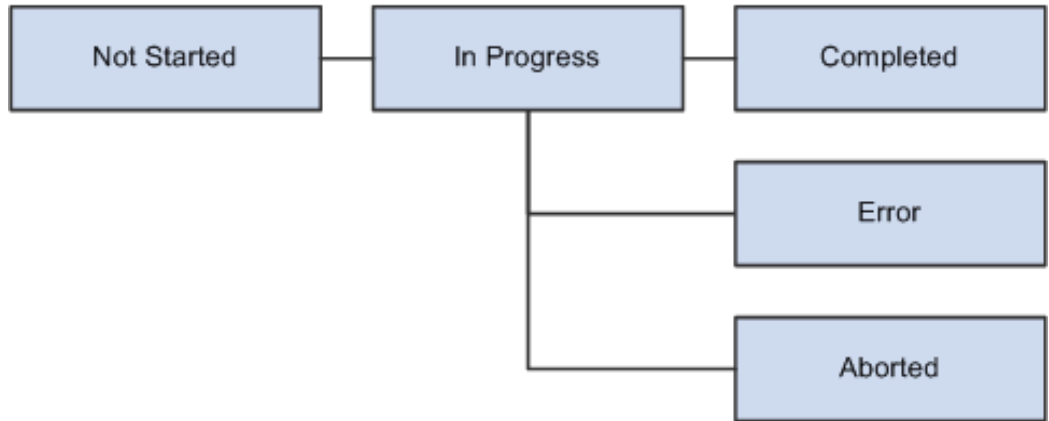
The Scenarios page is the primary work area used by a scenario manager or a planner. The user can perform these tasks:

- Manage scenarios, which includes creating, copying, editing, archiving, and purging scenarios.
- Associate or link plans to scenarios.
- Navigate from a scenario to a planning dashboard.
- Query and view scenarios.

Understanding Scenario States

Scenarios and scenario activities are assigned a status while they are processed.

This diagram illustrates the states that a scenario goes through in its life cycle. This is also applicable for all system activities for a scenario.



This table describes each state that a scenario or activity can have:

Status	Description
Not Started	When all activities (user and system) are not started.
In Progress	When at least one activity (user or system) is in progress.
Complete	When all activities (user and system) are complete.
Error	When at least one activity (user or system) is in an error state.
Warning	When at least one activity (user or system) is in a warning state.
Aborted	When at least one activity has terminated.

Accessing the Scenarios Page

The purpose of the Scenarios page is to provide you with a summary view of the selected scenarios. You can also view the plans that are attached to a selected scenario.

Use the Scenarios page to view, query, create, edit, copy, archive, and purge scenarios. Users can also remove and add plans to scenarios.

To access the Scenarios page:

1. Select the Advanced Planning Scenario Manager responsibility.

2. Select Scenarios.

The screenshot displays the Oracle Advanced Planning Command Center interface. At the top, there's a navigation bar with 'ORACLE Advanced Planning Command Center' and links for 'Home', 'Logout', 'Preferences', and 'Diagnostics'. Below this is a tabbed interface with 'Scenarios', 'Scenario Sets', 'Activities', and 'Planning Processes'. The 'Scenarios' tab is active, showing a search bar with 'Search Scenarios for' and a dropdown for 'Scenario name'. There are buttons for 'Search' and 'Advanced Search'. Below the search bar is a 'Views' section with a 'View' dropdown and 'Go' and 'Personalize' buttons. The main area shows a table of scenarios with columns: Select, Scenario Name, Description, Attachments, Version, Owner, Access, and Users. The table lists several scenarios, including '01-Risk Baseline', '02-Risk Scenario', and '1MayBase'. Below the scenarios table is a 'Plans' section with a 'Select Plan:' dropdown and buttons for 'Remove' and 'Add a new plan'. The 'Plans' table has columns: Select, Plan Type, Plan Name, Status, Version, Run Date, and Plan Horizon. It lists three plans: 'Strategic Network Optimization', 'Inventory Optimization', and 'Demand Management'. To the right of the 'Plans' table is a 'Scenario Comment:' text area. At the bottom right are 'Save' and 'Cancel' buttons.

The fields and definitions for the Scenarios table are:

Field Name	Definition
Search Scenarios for	Select from the list of options when performing a simple search such as: scenario name, scenario description, scenario owner, and so on.
Like	Enter a value that represents the field selected in the Search Scenarios for field. For example, if you select Scenario Owner in the Search Scenarios for field, enter an owner name in the Like field. The search criteria can be a partial value.
Search	Click to execute a search and refresh the tables below. This search is not case-sensitive.
Advanced Search	Click to access the Advanced Search page.

Field Name	Definition
Save	Click to save the page. You can continue editing.
Cancel	Click to discard changes and return to the page.
View	Select an option to view scenarios. Options include all personalized views for the user.
Go	Click to execute the option selected in the View field.
Personalize	Select to personalize the columns in the view. You can create multiple personalized views.
Create scenario	Click to access the Create Scenario page.
Copy	Click to access the Copy Scenario page. You must select a scenario before clicking the Copy button.
Archive	Click to archive the selected scenario and all of its plans. You must select a scenario before clicking the Archive button.
Purge	Click to access the Purge Scenario page. You must select a scenario before clicking the Purge button.
Analyze in	Select a dashboard to analyze the selected scenario. The options that are available are determined by user setup. Click the Go button to access the selected option.
Select	Select a radio button to select a scenario before clicking the Copy button, the Purge button, or the Archive button, or selecting an option in the Analyze in field.
Scenario Name	Click the scenario name to access the Edit Scenario page for the selected scenario. Results can be sorted on this field.

Field Name	Definition
Description	Displays the scenario description. Results can be sorted on this field.
Attachments	Click an icon to view or add attachments.
Version	<p>Displays the specific version of the scenario if it is an archived version. Or displays Current as a default, which is the latest version.</p> <p>See Understanding the Advanced Planning Analytical Framework, Archiving plans and scenarios.</p>
Owner	Displays the owner of this scenario. Results can be sorted on this field.
Access	Displays the access, Public or Private , for this scenario.
Users	Displays the users who have access to the scenario if the Access value is Private .

The Plan table displays the details of the selected scenario. The fields and definitions for the Plans table are:

Field Name	Definition
Remove	Select to remove the selected plan from the scenario.
Add a new plan	Select to create a new editable row in the Plans table.
Select	Select a radio button to select a plan before clicking the Remove button.

Field Name	Definition
Plan type	<p>Select the type of plan. Options include: Demand Management, Strategic Network Optimization, Advanced Supply Chain Planning, Inventory Optimization, Distribution Planning, and Service Planning. Results can be sorted on this field.</p> <p>Note: Scenarios with Service Planning type are currently not supported for viewing in the seeded dashboards or reports.</p>
Plan name	Select the plan that is displayed in the list that you want. The list contains all plans for the selected plan type. Results can be sorted on this field.
Status	Displays the status of the plan. Results can be sorted on this field.
Version	<p>Displays the version of the plan if it is an archived version. Or displays Current as a default, which is the latest version.</p> <p>See Understanding the Advanced Planning Analytical Framework, Archiving plans and scenarios.</p>
Run date	Displays the last run date for the plan. Results can be sorted on this field.
Plan Horizon	Displays the plan horizon. Results can be sorted on this field.

Searching for Scenarios

Two types of searches can be performed on the Scenarios page:

- Simple search.
- Advanced search.

To perform a simple search:

1. Select an option in the Search Scenarios for field.
2. Enter a value in the Like field.
3. Click the Search button.

To perform an advanced search:

1. Click the Advanced Search link.
2. Enter all criteria for the search.

Remember that the more fields you enter the smaller the search result.

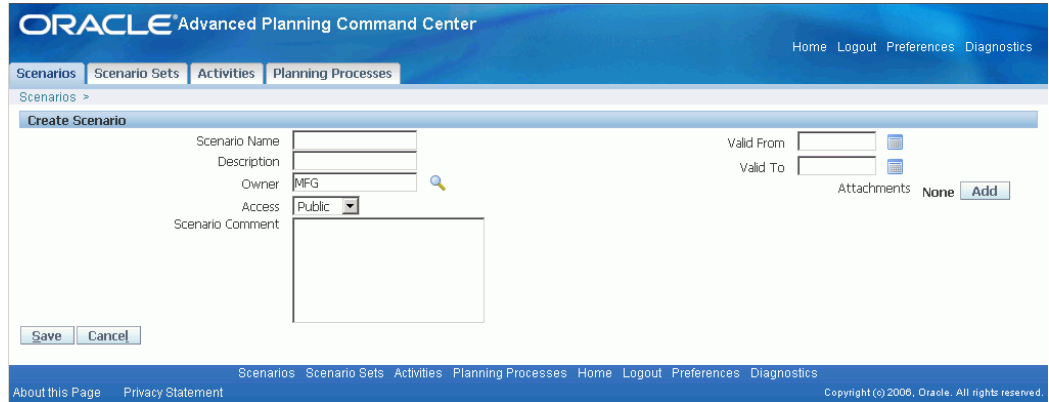
3. Click the Search button.

The screenshot shows the Oracle Advanced Planning Command Center interface. The top navigation bar includes links for Home, Logout, Preferences, and Diagnostics. Below this, a tabbed menu shows 'Scenarios' as the active tab. The 'Advanced Search' section is highlighted, with instructions to 'Specify parameters and values to filter the data that is displayed in your results set.' Two radio buttons allow users to choose between 'Show table data when all conditions are met.' (selected) and 'Show table data when any condition is met.' Below these are three search criteria: 'Scenario Name', 'Description', and 'Owner', each with a dropdown menu set to 'is' and an adjacent text input field. At the bottom of the criteria section are 'Go' and 'Clear' buttons, an 'Add Another' link, a dropdown for 'Description', and an 'Add' button. A table below the search criteria shows the results of the search. The table has columns for 'Scenario Select Name', 'Description', 'Owner', 'Access', 'Version', and 'Users'. The first row of the table contains the text 'No search conducted.' and a link to 'Simple Search'. The bottom of the page features a footer with 'About this Page', 'Privacy Statement', and 'Copyright (c) 2006, Oracle. All rights reserved.'

Creating New Scenarios

To create a new scenario:

1. Select the Advanced Planning Scenario Manager responsibility.
2. Select Scenarios.
3. Click the Create Scenario button.



The fields and definitions for the Create Scenario page are:

Field Name	Definition
Scenario Name	Enter a name that uniquely identifies the scenario.
Description	Enter a description of the scenario.
Owner	Select the owner of the scenario. The current user automatically defaults into the field.
Access	Select Public to enable the scenario to be editable and accessible to all users. Private to enable only the users listed in the Users field to edit and access the scenario.
Users	Select the users who are currently authorized to access the scenario when the Access field is Private. This field is not accessible when the Access field is Public.
Scenario comment	Enter comments for this scenario.
Attachments	Click the Add button to open the standard attachments table.
Valid from	Enter or select a date that determines the beginning of the scenario.
to	Enter or select a date that determines the end of the scenario.

Field Name	Definition
Save	Click to save the new scenario and return to the previous page.
Cancel	Click to cancel the entries and return.

Copying Scenarios

To copy a scenario:

1. Select the Advanced Planning Scenario Manager responsibility.
2. Select Scenarios.
3. Select the scenario to copy.
4. Click the Copy button.

The screenshot displays the 'Copy Scenario' form within the Oracle Advanced Planning Command Center. The form includes the following fields and controls:

- Scenario Name:** Text input field containing 'copy of 001-KP'.
- Description:** Text input field containing '001-KP'.
- Owner:** Text input field containing 'YSHIROLK'.
- Access:** Dropdown menu set to 'Public'.
- Scenario Comment:** Text area containing 'SNO Plan Archived - Week based'.
- Valid From:** Date picker.
- Valid To:** Date picker.
- Attachments:** Section with 'None' and an 'Add' button.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom left.

The page header shows 'ORACLE Advanced Planning Command Center' and navigation links: Home, Logout, Preferences, Diagnostics. The breadcrumb trail is 'Scenarios >'. The footer contains 'About this Page', 'Privacy Statement', and 'Copyright (c) 2006, Oracle. All rights reserved.'

The fields and definitions for the Copy Scenario page are the same as those on the Create Scenario page.

See Managing Scenarios, Working with Scenarios, Creating Scenarios.

Editing Scenarios

To edit a scenario:

1. Select the Advanced Planning Scenario Manager responsibility.
2. Select Scenarios.
3. Click the Scenario Name link.

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Scenarios Scenario Sets Activities Planning Processes

Edit Scenario

Scenario Name: 001-KP
 Description: 001-KP
 Owner: YSHIROLK
 Access: Public
 Scenario Comment: SNO Plan Archived - Week based

Valid From:
 Valid To:
 Attachments: None Add

Save Cancel

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The fields and definitions for the Edit Scenario page are the same as those on the Create Scenario page.

See Creating New Scenarios, page 2-10

Archiving Scenarios

To archive a scenario:

1. Select the Advanced Planning Scenario Manager responsibility.
2. Select Scenarios.
3. Select the scenario to archive.
4. Click the Archive button.

All plans for the scenario are automatically selected.

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Scenarios >

Archive Scenario: 001-KP

Select All | Select None

Select Plan Type	Plan Name	Version
<input type="checkbox"/>	Strategic Network Optimization 001-KP 04/04(0) [Baseline]	04-APR-2008
<input checked="" type="checkbox"/>	Advanced Supply Chain Planning JI-IO-ASCP 04/04(0)	04-APR-2008

OK Cancel

Scenarios Scenario Sets Activities Planning Processes Home Logout Preferences Diagnostics

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Purging Scenarios

Purging scenarios deletes all fact data and related summary aggregates of the scenario by deleting the fact data associated with the underling plans.

However, it does not delete the actual plan or forecast data that is used in respective applications such as Advanced Supply Chain Planning (ASCP), Strategic Network

Optimization (SNO), and so on. For example, the Purge Scenario is different from the Purge Plan program in ASCP. The Purge Plan in ASCP deletes the plan data.

Plans that are shared by more than one scenario cannot be selected on this page. Instead, use the Purge plan facts page to purge individual plans.

To purge scenarios:

1. Select the Advanced Planning Scenario Manager responsibility.
2. Select Scenarios.
3. Select the scenario to purge plan facts.
4. Click the Purge button.
5. Select the plan to be purged.

If a plan is part of another scenario, the Select check box is not available.

The screenshot shows the Oracle Advanced Planning Command Center interface. At the top, there's a navigation bar with 'Scenarios', 'Scenario Sets', 'Activities', and 'Planning Processes'. Below this, a 'Purge Scenario: 001-KP' dialog box is open. It contains a table with columns 'Select Plan Type', 'Plan Name', and 'Version'. Two rows are listed: 'Strategic Network Optimization' and 'Advanced Supply Chain Planning'. Both have checkboxes in the 'Select Plan Type' column. At the bottom of the dialog are 'OK' and 'Cancel' buttons. The footer of the page includes 'About this Page', 'Privacy Statement', and 'Copyright (c) 2006, Oracle. All rights reserved.'

Select Plan Type	Plan Name	Version
<input checked="" type="checkbox"/>	Strategic Network Optimization	001-KP 04/04(0) [Baseline] 04-APR-2008
<input checked="" type="checkbox"/>	Advanced Supply Chain Planning	JT-IO-ASCP 04/04(0) 04-APR-2008

If no plans are selected, the scenario definition is deleted. All plan data, fact, and summary information remains intact.

If some plans are selected, the scenario definition is deleted as well as the facts and summaries of the selected plans.

Purging Plan Facts

Use the Purge Plan Facts page to purge plan facts and summary data for an individual plan. All scenarios that use the plan are listed on the Purge Plan Facts page.

Use caution when purging plan facts. When plan facts are purged they are not available for analysis in any scenario. Plan facts cannot be recovered unless the plan is rerun or the facts are recalculated.

However, purging plan facts does not delete the actual plan or forecast data that is used in respective applications such as ASCP, SNO, and so on. For example, the Purge Plan Facts is different from the Purge Plan program in ASCP. The Purge Plan in ASCP deletes the plan data.

To purge plan facts:

1. Select the Advanced Planning Administrator responsibility.
2. Select Purge Plan Facts under the Admin heading.
3. Enter or select the plan in the Plan field.

All scenarios for the plan are listed.

Working with Scenario Sets

This section provides an overview of the Scenario Sets page and discusses how to:

- Access the Scenario Sets - Scenarios page.
- Access the Scenario Sets - Activities page.
- Create scenario sets.
- Edit scenario sets.

Understanding the Scenario Sets Page

The Scenario Sets page is a primary work area used by a scenario manager or a planner.

The user can:

- Manage scenario sets, which includes editing and creating scenario sets.
- Associate multiple scenarios with a scenario set.
- Manage activities within a scenario set, which includes creating activities, deleting activities, changing the status of an activity, and changing the owner of an activity.
- Query and view scenario sets.

Accessing the Scenario Sets - Scenarios Page

Use the Scenario Sets – Scenarios page to edit and create scenario sets.

To access the Scenario Sets – Scenarios page:

1. Select the Advanced Planning Scenario Manager responsibility.
2. Select Scenarios.

Alternatively, you can select Scenario Sets.

3. Select the Scenario Sets tab.

The screenshot shows the Oracle Advanced Planning Command Center interface. At the top, there's a navigation bar with 'ORACLE Advanced Planning Command Center' and links for 'Home', 'Logout', 'Preferences', and 'Diagnostics'. Below this is a sub-navigation bar with 'Scenarios', 'Scenario Sets', 'Activities', and 'Planning Processes'. The 'Scenario Sets' section is active, showing a search bar with 'Scenario set name' and a 'Search' button. Below the search bar, there's a 'Scenario Set' section with a dropdown for 'Sce Set-1' and buttons for 'Change to', 'Edit', and 'Create Scenario Set'. The 'Scenarios' tab is selected, showing a table with columns: 'Select Scenario', 'Owner', 'Attachments', 'Description', 'Valid From', and 'Valid To'. The table contains one row with 'C' in the 'Select Scenario' column, 'MFG' in the 'Owner' column, and '08-Apr-2008' in the 'Valid From' column. There are 'Save' and 'Cancel' buttons at the bottom right of the table.

The fields and definitions for the Scenario Sets – Scenarios page are:

Field Name	Definition
Search Scenarios for	Select an option to search scenarios.
Like	Enter a value to help reduce the results of the search. If the search results in multiple scenario sets, the tables display the first scenario set. Users can cycle through the remaining scenario sets using the Change to field.
Search	Click to execute the search and refresh the tables.
Save	Click to save changes and return to the current page.
Cancel	Click to discard changes and return to the previous page.
Change to	Select to view another scenario set. All scenario sets that match the search criteria are listed.
Edit	Click to edit the selected scenario set.
Create scenario set	Click to create a new scenario set.

Field Name	Definition
Analyze in	Select a dashboard to analyze the selected scenario. The options that are available are determined by user setup. Click the Go button to access the selected option.
Select	Select a radio button to select a scenario before clicking the Go button.
Scenario	Click the scenario name to view the selected scenario details on the Scenarios page. Results can be sorted on this field.
Owner	Click to access the Activities tab for the owner name. All activities that are associated with this owner are displayed. Results can be sorted on this field.
Attachments	Click to view attachments.
Description	Displays the scenario description.
Valid from	Displays the valid from date.
Valid to	Displays the valid to date.

Accessing the Scenario Sets - Activities Page

Use the Scenario Sets – Activities page to create, delete, change the status of, or change the owner of an activity.

To access the Scenario Sets – Activities page:

1. Select the Advanced Planning Scenario Manager responsibility.
2. Select Scenarios.
Alternatively, you can select Scenario Sets.
3. Select the Scenario Sets tab.
4. Click the Activities tab.

The fields and definitions for the Scenario Sets – Activities page are:

Field Name	Definition
View	Select an option to view activities for the selected scenario set. Options include all personalized views for the user.
Go	Click to execute the option selected in the View field.
Personalize	Click to create personalized views for the user.
Create activity	Click to access the Create Activity page.
Delete	Click to delete the selected activity.
Set status to	<p>Select an option to change the status of an activity. Options include:</p> <ul style="list-style-type: none"> • Not Started • In Progress • Escalated • Completed

Field Name	Definition
Change owner to	Select an option to change the owner of an activity.
Update	Click to carry out an option selected in the Set status to or Change owner to fields.
Select	Select a radio button to select an activity before clicking the delete button, selecting an option in the Set status to field, selecting an option in the Change owner to field, or clicking the Update button.
Activity	Click to access the Activity tab for the activity.
Description	Displays the activity description.
Status	Displays the activity status. To change this value, select the radio button for the activity, select an option in the Set status to field, and click the Update button.
Scenario	Click to access the Scenario page for the scenario.
Owner	Click to access the Activities tab for the owner. All activities for the owner are displayed.
Finish by	Displays the finish by date for the activity.
Priority	Displays the priority for the activity
Attachments	Click to view attachments.
Completed on	Displays the date that an activity was completed.
Alternate Owner	Displays the alternate owner name.
Created by	Displays the name of the person who created the activity.
Created on	Displays the date that the activity was created.

Field Name	Definition
Activity Comment	Enter comments for this activity.
Activities Summary	Displays a summary of all activities queried for the scenario set.

Creating Scenario Sets

Use the Create Scenario Set page to create a scenario set.

To create a scenario set:

1. Select the Advanced Planning Scenario Manager responsibility.
2. Select Scenarios.
Alternatively, you can select Scenario Sets.
3. Select the Scenario Sets tab.
4. Click the Create Scenario Set button.
5. Enter a name in the Scenario Set Name field.
6. Enter a description in the Description field.
7. Click the Add button to add a row in the Select Scenario table.
8. Click the Search for Scenario button.
9. Search and select a scenario to add to the scenario set.
10. Click the Save button.

To remove scenarios from a scenario set:

1. Select the scenario using the Select radio button.
2. Click the Remove button.

Editing Scenario Sets

Use the Edit Scenario Set page to edit scenario sets.

To edit a scenario set:

1. Select the Advanced Planning Scenario Manager responsibility.
2. Select Scenarios.

Alternatively, you can select Scenario Sets.

3. Select the Scenario Sets tab.
4. Select the scenario set in the Change to field.
5. Click the Edit button.

The fields and definitions on the Edit Scenario Set page are the same as those on the Create Scenario Set page.

See Creating Scenario Sets, page 2-20

Working with Activities

This section provides an overview of the Activities page and discusses how to:

- Access the Activities page.
- Create activities.
- Edit activities.

Understanding the Activities Page

Use the Activities page to query, view, and create all activities including manually entered activities and system activities.

- Manual activities are created in the context of a scenario or scenario set.
- A planning process generates system activities.

Accessing the Activities Page

To access the Activities page:

1. Select the Advanced Planning Scenario Manager responsibility.
2. Select Scenarios.

Alternatively, you can select Activities.

3. Select the Activities tab.

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Search Activities for Like [Advanced Search](#)

Activity Summary

	Past Due	Due Today	Due in future	Total	Past Due	Due Today	Due in future	Total	Grand Total
Manual :									
Not Started	62	0	0	62	Not Started	181	0	0	181
In-Progress	4	0	0	4	In-Progress	11	0	0	11
Error	1	0	0	1	Error	9	0	0	9
Total	67	0	0	67	Total	201	0	0	201

Views

View

Select Activity : Set status to Change Owner to

[Select All](#) | [Select None](#)

Select Activity	Description	Status	Owner	Scenario Set	Finish By	Priority	Completed On	Type	Alternate Owner	Created By	Created On
<input type="checkbox"/> Abort - Generate Forecast		Not Started	SURESH		04-Apr-2008			System		SURESH	04-Apr-2008
<input type="checkbox"/> Abort - Launch ASCP Collections		Not Started	SURESH		04-Apr-2008			System		SURESH	04-Apr-2008
<input type="checkbox"/> Abort - Launch Demantra Collections & Download		Not Started	SURESH		04-Apr-2008			System		SURESH	04-Apr-2008
<input type="checkbox"/> Abort - Launch Inventory Plan		Completed	SURESH		04-Apr-2008		04-Apr-2008	System	VENKAT	SURESH	04-Apr-2008
<input type="checkbox"/> Abort - Launch Supply Chain Plan		Aborted	SURESH		04-Apr-2008			System	VENKAT	SURESH	04-Apr-2008

The fields and definitions for the Activities page are:

Field Name

Definition

Search Activities for

Select from the list of options when performing a simple search. Options include: Activity Name, Activity Description, Activity Status, Owner, and so on.

Like

Enter a value that represents the field selected in the Search Activities for field. For example, if you select Owner in the Search Activities for field, enter an owner name in the Like field.

Search

Click to execute a search and refresh the tables below.

Field Name	Definition
Advanced Search	Click to access the Advanced Search page.
Save	Click to save the page and enable the user to continue editing.
Cancel	Click to discard changes and return to the previous page.
Activities Summary	<p>Displays a high-level summary of all manual and system activities by activity type. Columns display activities that are past due, due today, due in the future, and the total for each status.</p> <p>Click the links within the table to refresh the page and display only those activities.</p>
View	Select an option to view activities. Options include a default view and all personalized views for the user.
Go	Click to execute the option selected in the View field.
Personalize	Select to create personalized views.
Create activity	Click to access the Create Activity page.
Delete	Click to delete the selected activity from the system. The activity is also deleted from the relevant scenario and scenario set.
Set status to	<p>Select an option to change the status of an activity. Options include:</p> <ul style="list-style-type: none"> • Not Started. • In Progress. • Escalated. • Completed.

Field Name	Definition
Change owner to	Select an option to change the owner of an activity.
Update	Click to execute an option selected in the Set status to and Change owner to fields.
Select	<p>Select a check box to select one or more activities before:</p> <ul style="list-style-type: none"> • Clicking the delete button. • Selecting an option in the Set status to field. • Selecting an option in the Change owner to field. <p>If a manual activity is selected, the user receives this error message: Cannot update or delete system activities.</p>
Activity	<p>Select to access one of these pages:</p> <ul style="list-style-type: none"> • If the activity is a user-defined manual activity (not related to a planning process), then the Edit Activity page appears. • If the activity is a part of a planning process (an automated or a manual process), then the Planning Process page appears and displays the planning process to which the activity belongs.
Description	Displays the activity description.
Status	Displays the activity status.
Owner	Click this link to refresh the Activities tab with all activities for which this user is the owner.
Scenario	Click this link to open the Scenario page for the specific scenario.

Field Name	Definition
Scenario Set	Click this link to open the Scenario Set page for the specific scenario set.
Finish by	Displays the Finish by date.
Priority	Displays the priority that is assigned by the user.
Completed on	Displays the completed date for activities that have a Completed status.
Type	Displays the type of activity. Options include Manual and System Generated .
Alternate Owner	Displays the alternate owner.
Created by	Displays the name of the person who created the activity
Created on	Displays the date that the activity was created.
Comments	Displays comments.
Attachments	Click the icon to view or add attachments.

Creating Activities

Use the Create Activity page to create activities. You can access this page from the Scenarios page, the Scenario Sets page, or the Activities page.

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Home Logout Preferences Diagnostics

Scenarios Scenario Sets **Activities** Planning Processes

Activities >

Cancel Apply

Create Activity

* Activity Name

Description

* Owner

Scenario

* Status

Scenario Set

Finish By

Comments

Alternate Owner

Priority

Add Attachments None

Cancel Apply

Scenarios Scenario Sets Activities Planning Processes Home Logout Preferences Diagnostics

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To create activities from the Activities page:

1. Select the Advanced Planning Scenario Manager responsibility.
2. Select Scenarios.
Alternatively, you can select Activities.
3. Select the Activities tab.
4. Click the Create activity button.
5. Complete all required fields.
6. Click the Save button.

The fields and definitions for the Activities page are:

Field Name	Definition
Activity Name	Enter a name that uniquely identifies the activity.
Owner	Select an owner of the activity. The system automatically selects the current user name. When you update the Owner field, or create a new activity for an owner, a workflow notification is sent to the owner who has the activity information.

Field Name	Definition
Status	<p>Select a status for the activity. The system automatically selects Not Started as the activity status. Other options include:</p> <ul style="list-style-type: none"> • In Progress. • Escalated. • Completed.
Finish by	<p>Enter or select the date that the activity is to be finished. If the finish by date arrives and the activity does not have a Completed status, a workflow notification is sent to the alternate owner.</p>
Alternate owner	<p>Select an alternate owner.</p>
Priority	<p>Select a priority. Options include High, Medium, and Low.</p>
Description	<p>Enter a description of the activity.</p>
Scenario	<p>Select a valid scenario.</p>
Scenario Set	<p>Select a valid scenario set.</p>
Comments	<p>Enter comments for the activity.</p>
Attachments - Add	<p>Click to add attachments for the activity.</p>

Editing Activities

Use the Edit Activities page to edit activities.

To edit an activity:

1. Select the Advanced Planning Scenario Manager responsibility.
2. Select Scenarios.

Alternatively, you can select Activities.

3. Select the Activities tab.
4. Select the link with the name of a manual activity.

All fields on the Edit Activity page are the same as those on the Create Activity page.

See Creating Activities, page 2-25

Working with Planning Processes

This section provides an overview of the Planning Processes page and discusses how to:

- Access the Planning Processes page.
- Enter parameters.
- Start planning processes.
- Schedule planning processes.
- Terminate planning processes.

Understanding the Planning Processes Page

Use the Planning Processes page to create, query, and view planning processes.

Accessing the Planning Processes Page

To access the Planning Processes page:

1. Select the Advanced Planning Scenario Manager responsibility.
2. Select Scenarios.
Alternatively, you can select Planning Processes.
3. Select the Planning Processes tab.

ORACLE Advanced Planning Command Center

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Scenarios Scenario Sets Activities **Planning Processes**

Search Planning Process for Activity Owner like Search [Advanced Search](#) Save Cancel

Process

Select a Process Start Schedule Abort Create Delete Previous 1-5 Next 5

Select Process	Process flow	Description	Last run start date	Status
<input type="radio"/> SOP-0104-1	Sales_And_Operation	SNO Plan Launch	01-Apr-2008 03:56:55	
<input type="radio"/> SOP-0404-1	Sales_And_Operation	Abort test	04-Apr-2008 03:34:29	
<input type="radio"/> SOP-1104-3	Sales_And_Operation	JDM Coll	11-Apr-2008 09:54:11	
<input type="radio"/> CS1-030408	Forecast_Inventory_S	CS1-030408	08-Apr-2008 13:35:57	
<input type="radio"/> SOP-0904-5	Sales_And_Operation	Approve forecast	09-Apr-2008 01:25:17	

Activities

Select Activity Type	Process Scope	Plan	Skip	Owner	Status	Parameters	Alternate Owner	Time Out
No results found.								

Save Cancel

Scenarios Scenario Sets Activities Planning Processes Home Logout Preferences Diagnostics

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The fields and definitions for the Planning Processes page are:

Field Name	Definition
Search Planning Processes for	Select from the list of options when performing a simple search. Options are: Process Name, Process Description, Process Status, Process Flow, and so on.
Like	Enter a value that represents the field selected in the Search Planning Processes for field.
Search	Click to execute a simple search and refresh the tables below.
Advanced Search	Click to access the Advanced Search page.
Save	Click to save the page and enable the user to continue editing.
Cancel	Click to discard changes and return to the previous page.
Start	Click to access the Start Process page. This starts the underlying BPEL process for the selected process.

Field Name	Definition
Schedule	Click to access the Schedule Process page. This enables you to schedule the underlying BPEL process for the selected process.
Abort	Click to access the Abort Process page for the selected process.
Create	Click to add a new row in the table and create a new process using a predefined process flow templates.
Select	Select a radio button to select a process before clicking the Start, Schedule, or Abort button.
Process	Enter a name that uniquely identifies a process.
Process flow	Select a process flow. The list of values includes all predefined BPEL process flows that are delivered for the Advanced Planning Suite. The system populates the Activities table with the activities of the selected process flow.
Description	Enter a description of the process.
Last run start date	Displays the last time and date that the process ran.
Status	Displays a derived status of the process from the statuses of all its activities.

Fields and definitions for the Activities table on the Planning Processes page are:

Field Name	Definition
Select	Select a radio button to select an activity before taking an action such as Schedule, Abort, Delete, and so on.

Field Name	Definition
Activity type	Displays the activity type of all activities in the BPEL process flow. This field displays the name of the activity that corresponds to a specific step in the BPEL process flow.
Process Scope	Displays the process scope node that is associated with the activity type. This field displays the internal name of the BPEL scope node for the activity.
Plan	Select the plan for which the activity runs
Skip	Select to have the system bypass the activity.
Owner	Select the owner of the activity.
Status	<p>Displays the status of the activity. The status is derived from the run status of the plan. Values are:</p> <ul style="list-style-type: none"> • Not Started. • In Progress. • Completed. • Error.
Parameters	Click to access the Parameters page for the activity.
Alternate Owner	Select an alternate owner.
Timeout (hrs)	Enter a number of hours that must pass before activity is considered timed-out. The BPEL process uses this value to send a notification to the alternate owner. The timeout starts at the beginning of the activity.

Entering Parameters

The parameters table is populated with the list of parameters that are relevant for each

BPEL activity with the corresponding list of valid values for each parameter.

To enter parameters:

1. Select the Advanced Planning Scenario Manager responsibility.

2. Select Scenarios.

Alternatively, you can select Planning Processes.

3. Select the Planning Processes tab.

4. Search for a process.

5. Select a process.

The Activities table lists all activities for the process.

6. Select an activity.

7. Click the Parameters icon.

8. Select an activity in the Activity field.

9. Select or enter a valid value for each parameter.

10. Click the Save button.

The screenshot displays the Oracle Advanced Planning Command Center interface. At the top, the header includes the Oracle logo and the text "Advanced Planning Command Center". Navigation links for "Home", "Logout", "Preferences", and "Diagnostics" are visible. Below the header, a tabbed interface shows "Scenarios", "Scenario Sets", "Activities", and "Planning Processes". The "Planning Processes" tab is active, displaying the process name ":SOP-0404-1".

Below the process name, there is a "Save", "Apply", and "Cancel" button set. The main area shows a table with parameters for the selected process. The table has two columns: "Parameter" and "Value". The parameters listed are:

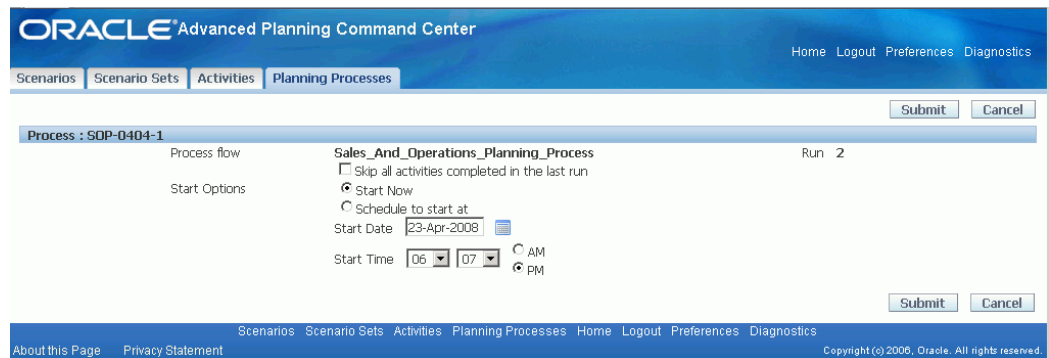
Parameter	Value
Instance	
Collections Group	
Number of workers	3
Timeout (Minutes)	180
Purge Previously Collected Data	Yes
Collection Method	Complete Refresh
Analyze Staging Tables	No
Collect Approved Supplier Lists (Supplier Capacities)	Yes, replace all values
Collect ATP Rules	Yes
Collect Bill of Materials/Routings/Resources	Yes

At the bottom of the table, there are navigation links: "Previous", "1-10", and "Next 10". Below the table, there is another "Save", "Apply", and "Cancel" button set. The footer of the page includes links for "About this Page" and "Privacy Statement", and a copyright notice: "Copyright (c) 2006, Oracle. All rights reserved."

Starting Planning Processes

To start a planning process:

1. Select the Advanced Planning Scenario Manager responsibility.
2. Select Scenarios.
Alternatively, you can select Planning Processes.
3. Select the Planning Processes tab.
4. Select the radio button for the process.
5. Click the Start button.
6. Select Skip all activities completed in the last run to rerun only the activities that do not have a Completed status from the previous run.
Do not select Skip all activities completed in the last run to rerun the process from start to end.
7. Select Start Now as the Start Option.
8. Click the Submit button.



ORACLE Advanced Planning Command Center

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Scenarios Scenario Sets Activities Planning Processes

Submit Cancel

Process : SDP-0404-1

Process flow Sales_And_Operations_Planning_Process Run 2

Start Options

☐ Skip all activities completed in the last run

☒ Start Now

☐ Schedule to start at

Start Date 23-Apr-2008

Start Time 06 07 AM

Submit Cancel

Scenarios Scenario Sets Activities Planning Processes Home Logout Preferences Diagnostics

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Scheduling Planning Processes

To schedule a planning process:

1. Select the Advanced Planning Scenario Manager responsibility.
2. Select Scenarios. Alternatively, you can select Planning Processes.
3. Select the Planning Processes tab.
4. Select the radio button for the process.
5. Click the Schedule button.
6. Select Skip all activities completed in the last run to rerun only the activities that do

not have a Completed status from the previous run.

Do not select Skip all activities completed in the last run to rerun the process from start to end.

7. Select Schedule to start the Start option.
8. Enter or select a value in the Start Date and Start Time fields.
9. Click the Submit button.

Terminating Planning Processes

To terminate a planning process:

1. Select the Advanced Planning Scenario Manager responsibility.
2. Select Scenarios.
Alternatively, you can select Planning Processes.
3. Select the Planning Processes tab.
4. Select the radio button for the process.
5. Click the Abort button.
An Abort Process page appears.
6. Click the OK button.

Understanding Service - Enablement Planning Processes

This chapter covers the following topics:

- Understanding Oracle's Advanced Planning Business Processes
- The Forecast, Inventory, and Supply Planning Business Process
- The Sales and Operations Planning Business Process
- Web Services
- Access to Embedded Demantra Worksheets

Understanding Oracle's Advanced Planning Business Processes

A primary objective of the Advanced Planning Command Center application is to enable Oracle Advanced Planning customers to automate supply chain planning processes. These processes often include subprocesses that cross multiple Advanced Planning Suite (APS) engines and plan runs. For example, you can run the APS collections process in Advanced Supply Chain Planning (ASCP), followed by generating forecasts in Demand Management, followed by generating time-phased safety stock in Inventory Optimization, followed by generating detailed replenishment in ASCP.

To achieve this objective, APS planning processes must be divided into modular, callable subprocesses that can be chained together to meet the business needs of the individual customer.

These callable pieces are orchestrated using business logic and are constructed as web services. The business logic is expressed in Business Process Execution Language (BPEL).

Oracle's Advanced Planning Command Center delivers two pre-seeded BPEL process flow templates. These flow templates cover the common supply chain planning flows:

- The Forecast, Inventory, and Supply Planning business process flow.

- The Sales and Operations Planning business process flow.

Both processes use web services that orchestrate standard planning business process flows.

The Forecast, Inventory, and Supply Planning Business Process

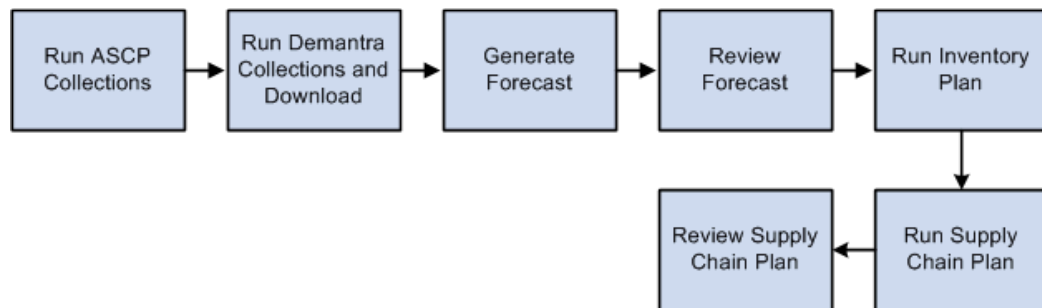
The objective of this business process flow is to automate a typical forecasting, inventory, and supply planning cycle. It can be executed multiple times using different parameters to evaluate different risk scenarios for supply chain risk management.

Planning process activities are implemented as summary process blocks called scope nodes, which are also known as subprocesses. The sequence of the Forecast, Inventory, and Supply Planning subprocesses are:

1. Run the ASCP Collections subprocess.
2. Run the Demantra Collections and Download subprocess.
3. Generate the Forecast subprocess.
4. Review the Forecast subprocess.
5. Run the Inventory Plan subprocess.
6. Run the Supply Chain Plan subprocess.
7. Review the Supply Chain Plan subprocess.

To learn more about the subprocesses, refer to Appendix A *BPEL Processes* in this document.

This diagram illustrates the Forecast, Inventory, and Supply Planning business process:



The individual subprocess diagrams of the Forecast, Inventory, and Supply Planning process flow diagram can be found in Appendix A of this user's guide.

See The Forecast and Supply Planning BPEL Business Process, page A-1

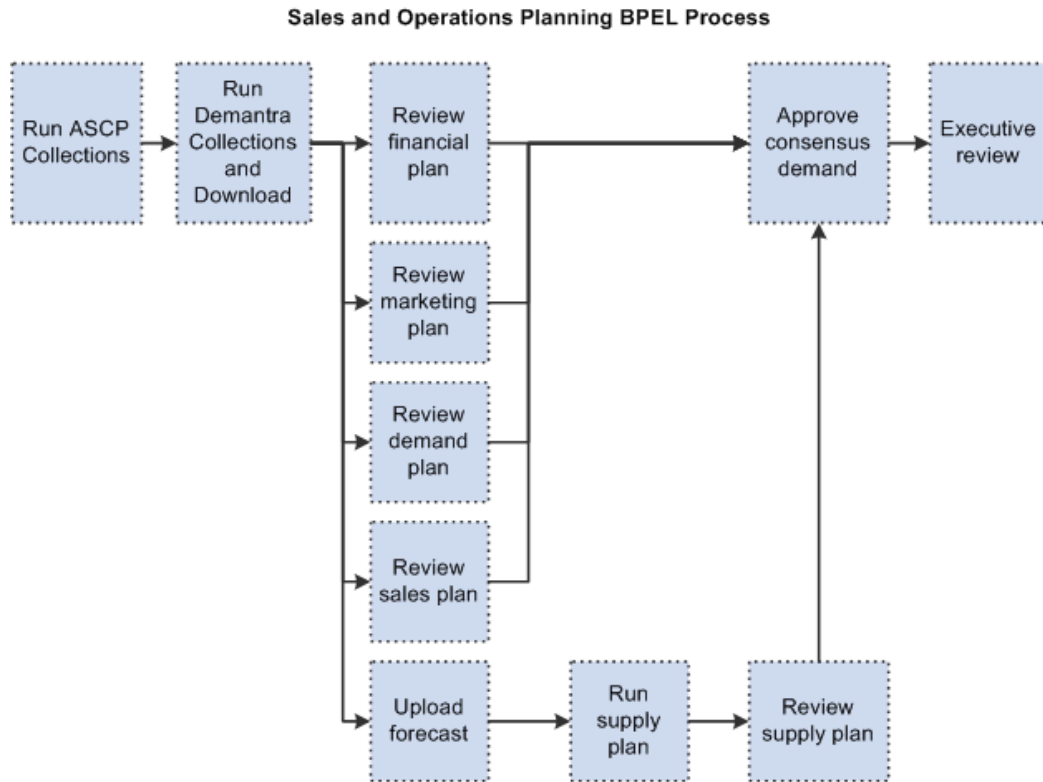
The Sales and Operations Planning Business Process

The objective of this business process flow is to automate a typical sales and operations planning cycle.

Planning process activities are implemented as summary process blocks called scope nodes, which are also known as subprocesses. The sequence of the Sales and Operations Planning subprocesses are:

1. Run the ASCP Collections subprocess.
2. Run the Demantra Collections and Download subprocess.
3. Review the Financial Plan subprocess.
4. Review the Marketing Plan subprocess.
5. Review the Demand Plan subprocess.
6. Review the Sales Plan subprocess.
7. Upload the Forecast subprocess.
8. Run the Supply Plan subprocess.
9. Review the Supply Plan subprocess.
10. Approve the Consensus Demand subprocess.
11. Perform an Executive Review subprocess.

This diagram illustrates the Sales and Operations Planning business process:



The individual subprocess diagrams of the Sales and Operations Planning process flow diagram can be found in Appendix A of this user's guide.

See The Sales and Operations Planning BPEL Business Process, page A-14

Web Services

Oracle Advanced Planning Command Center provides a set on web services that are part of the business process flows. These web services are independently managed, loosely coupled, flexible, and reusable. They are built on top of Oracle Fusion Middleware and service-oriented architecture (SOA) technology.

Advanced Supply Chain Planning Web Services

This table lists the web services used by Advanced Supply Chain Planning (ASCP):

Service Operation	Service Description	API Type	Synch / Asynch
Release ASCP Recommendations	Release ASCP new purchase order, new work order, new transfer order, and implement, reschedule, or cancel (purchase order, sales order, internal requisition) recommendations.	Internal	Synch
Run ASCP Engine in Batch Mode	Launches ASCP concurrent program. Assume that the needed data is available in the Operation Data Store (ODS). The invoker of this service does not wait for the run to complete.	Internal	Asynch
Set ASCP Plan Options	Updates plan options for ASCP plans.	Internal	Synch

Advanced Planning Suite Web Services

This table lists the web services used by APS:

Service Operation	Service Description	API Type	Synch/Asynch
Data Export – Download Forecast	Allows external planning systems to retrieve forecast and forecast accuracy metrics.	Public	Synch
Data Export – Download Safety Stock		Public	Synch

Service Operation	Service Description	API Type	Synch/Asynch
Data Import – Upload Forecast	Allows external demand planning systems to integrate.	Public	Synch
Data Import – Upload Planned Supply	Uploads user-defined supplies as firm planned orders into an ASCP, Demand Resource Planning (DRP), or Service Resource Planning (SRP) plan.	Public	Synch
Data Import – Upload Safety Stock	Allows an external IO system to integrate.	Public	Synch

Collections Web Services

This table lists the web services used by Collections:

Service Operation	Service Description	API Type	Synch/Asynch
Run ASCP Collections	Launches ASCP collection concurrent program, which includes the ODS load. The invoker of this service does not wait for run to complete.	Internal	Asynch
Run Demantra Collections – Currency Conversions	Launches Demantra Currency Conversions collections concurrent program. The invoker of this service does not wait for the run to complete.	Internal	Asynch

Service Operation	Service Description	API Type	Synch/Asynch
Run Demantra Collections – Pricing Data	Launches Demantra Pricing Data collections concurrent program. The invoker of this service does not wait for the run to complete.	Internal	Asynch
Run Demantra Collections – Returns History	Launches Demantra Returns History collections concurrent program. The invoker of this service does not wait for the run to complete.	Internal	Asynch
Run Demantra Collections – SCI Data	Launches Demantra SCI Data collections concurrent program. The invoker of this service does not wait for the run to complete.	Internal	Asynch
Run Demantra Collections – Shipment and Booking History	Launches Demantra Shipment and Booking History collections concurrent program request set. The invoker of this service does not wait for the run to complete.	Internal	Asynch
Run Demantra Collections – UOM Conversions	Launches Demantra UOM (unit of measure) conversions collections concurrent program. The invoker of this service does not wait for the run to complete.	Internal	Asynch

Service Operation	Service Description	API Type	Synch/Asynch
Run ODS Load	Launches ODS (Operation Data Store) Load concurrent program. The invoker of this service does not wait for the run to complete.	Internal	Asynch

Demantra Web Services

This table lists the web services used by Demantra:

Service Operation	Service Description	API Type	Synch/Asynch
Assign Plan Name	Changes the Demand Planning (DP) scenario name of the uploaded Demantra output in the DP_SCENARIO_ENT RIES denorm table from that of the export integration profile to an arbitrary plan name. This process is not applicable anymore other than to ensure backwards compatibility and to support the Demantra Web Service profile.	Internal	Synch
Check Demantra Workflow Status	Checks for completion status of a Demantra workflow. For example, the Forecast Calculation and Approval workflow.	Internal	Synch

Service Operation	Service Description	API Type	Synch/Asynch
Run Demantra Workflow	Runs a specific named Demantra workflow in its entirety. Options are synchronous and asynchronous.	Internal	Synch/Asynch
Run Demantra Workflow with Context	Runs a specific named Demantra workflow with a level member context in its entirety. Options are synchronous and asynchronous.	Internal	Synch/Asynch
Terminate Demantra Workflow	Terminates a specific named Demantra workflow.	Internal	Asynch

Distribution Planning Web Services

This table lists the web services used by Distribution Planning:

Service Operation	Service Description	API Type	Synch/Asynch
Release DRP Results	Releases all changes to the operation system.	Internal	Synch
Run DRP Engine in Batch Mode	Launches DRP concurrent program. Assumes that the required data is available in the ODS. The invoker of this service does not wait for the run to complete.	Internal	Asynch
Set DRP Plan Options	Updates plan options for DRP plans.	Internal	Synch

Inventory Optimization Web Services

This table lists the web services used by IO:

Service Operation	Service Description	API Type	Synch/Asynch
Run IO Engine in batch mode	Launches IO concurrent program. Assumes that the required data is available in the ODS. Sets the Launch Planner to Yes. The invoker of this service does not wait for the run to complete.	Internal	Asynch
Set IO Plan Options	Updates plan options for IO plans.	Internal	Synch

Order Promising Web Service

This table lists the web service used by Order Promising:

Service Operation	Service Description	API Type	Synch/Asynch
Get Promise Date	Gets the product availability and date information that can be promised to a customer.	Public	Synch

Plan Management Web Services

This table lists the web services used by Plan Management:

Service Operation	Service Description	API Type	Synch/Asynch
Copy Plan	Launches the copy plan concurrent program to copy an ASCP, DRP, IO, or SRP plan. The invoker of this service does not wait for the run to complete.	Internal	Asynch
Purge Plan	Launches the purge plan concurrent program to copy an ASCP, DRP, IO, or SRP plan. The invoker of this service does not wait for the run to complete.	Internal	Asynch
Archive Plan	Extracts named metrics from input plans and copies them into separate archive metrics with the version number in the OBIEE (Oracle Business Intelligence – Enterprise Edition) repository.	Internal	Asynch

Scenario Management Web Services

This table lists the web services used by Scenario Management:

Service Operation	Service Description	API Type	Synch/Asynch
Check Process Status	Checks the status of any concurrent request and return statuses for Complete , Failed , or In Progress . Returns basic error information if the status is Failed.	Internal	Synch
Notify user	Sends a notification to a user when a task is complete or has failed, the users' assignment to a task, when a task is past due, when a task has changed, and so on.	Internal	Synch
Get Process Information	Retrieves attributes of a process.	Internal	Synch
Get Activity Information	Retrieves attributes of an activity. For example, the status, the due date, the owner, and so on.	Internal	Synch
Get Parameter Values	Retrieves parameters of an activity.	Internal	Synch
Update Process	Updates the process to indicate that it has started.	Internal	Synch
Set Activity Status	Updates the attributes of a process activity. For example, the status, the due date, the owner, and so on.	Internal	Synch
Archive Scenario	Associates versions of different plans to a scenario version.	Internal	Asynch

Service Parts Planning Web Service

This table lists the web services used by Service Parts Planning:

Service Operation	Service Description	API Type	Synch/Asynch
Release SRP Results	Releases all changes to the operation system.	Internal	Synch
Run SRP Engine in batch mode	Launches SRP concurrent program. Assumes that the required data is in the ODS. The invoker of this service does not wait for the run to complete.	Internal	Asynch
Set SRP Plan Options	Updates plan options for SRP plans.	Internal	Synch

Strategic Network Optimization Web Services

This table lists the web services used by Strategic Network Optimization (SNO):

Service Operation	Service Description	API Type	Synch/Asynch
Generate SNO Model	Read the SNO plan options, optionally take a snapshot of the data in the ODS, generate SCBM (Supply Chain Business Modeler) xml files, generate the SNO import file, and run a SNO solve.	Internal	Asnych
Publish SNO Results	Publish SNO results into PDS (Planning Data Store).	Internal	Asnych

Access to Embedded Demantra Worksheets

This feature allows you to access and update a Demantra worksheet without having to leave the APCC application. It is a variation of the Demantra Anywhere functionality, which allows an external user to log into Demantra. Using standard worksheet functionality, you can make adjustments to historical data or the statistical forecast, run simulations, and save any changes.

Enabling Demantra Anywhere

Note: The Demantra Anywhere login process requires Oracle Single Sign On, and both applications must be registered with the same SSO server.

To configure Demantra Anywhere:

1. In Demantra, open the Business Modeler
2. Go to Security > Create/Modify User > (select user) > Modules
3. Enable Demantra Anywhere

Creating a custom report with a Demantra URL

After configuring Demantra anywhere, you can create a custom report in APCC with a link to a Demantra worksheet. To create a custom report:

Note: To perform this procedure you should have basic OBIEE knowledge, understand how to create an Answers reports, and know when to restart the OBIEE servers

1. Disable OBIEE SSO, login to Answers as Administrator
2. Create a new report and save (for example) in the Shared/Others folder
3. Add Scenario, Item, Organization, Budget, and Budget
4. Change second Budget formula to: '(left chevron) a href="" || valueof(NQ_SESSION.APPS_SERVLET_AGENT)||'/MscObieeSrvlt?ParamType=Name(ampersand) Wnd=DMA(ampersand) QueryName=Export OBI Data(ampersand) CombinationName=Item,'||'" - Item".Item||';Demand Class,'||'" - Demand Class"."Demand Class"||';Organization,'||'" - Organization"."Organization Code"||'"(right chevron) (right chevron) (right chevron) (left chevron) /a(right chevron) '

5. Set the data format to HTML.
6. Add narrative view with following content as prefix: (left chevron)
a
`href="@{biServer.variables["NQ_SESSION.APPS_SERVLET_AGEN
T"]}/MscObieeSrvlt?ParamType=Name(ampersand)
Wnd=DMA(ampersand) QueryName=Export OBI Data"(right
chevron) Export OBI Data(left chevron) /a(right chevron)`

After creating the custom report, you can run the report as described below.

Running the report

To run the custom report, first enable OBEE SSO, then open the report from any of the dashboards (for example, the Sales and Operations Dashboard). There is no limit on which applications can use embedded Demantra as long as they have the same SSO and can pass the relevant URL and context. The internal syntax for each application may differ in order to formulate the correct call to Demantra.

Understanding the Advanced Planning Analytical Framework

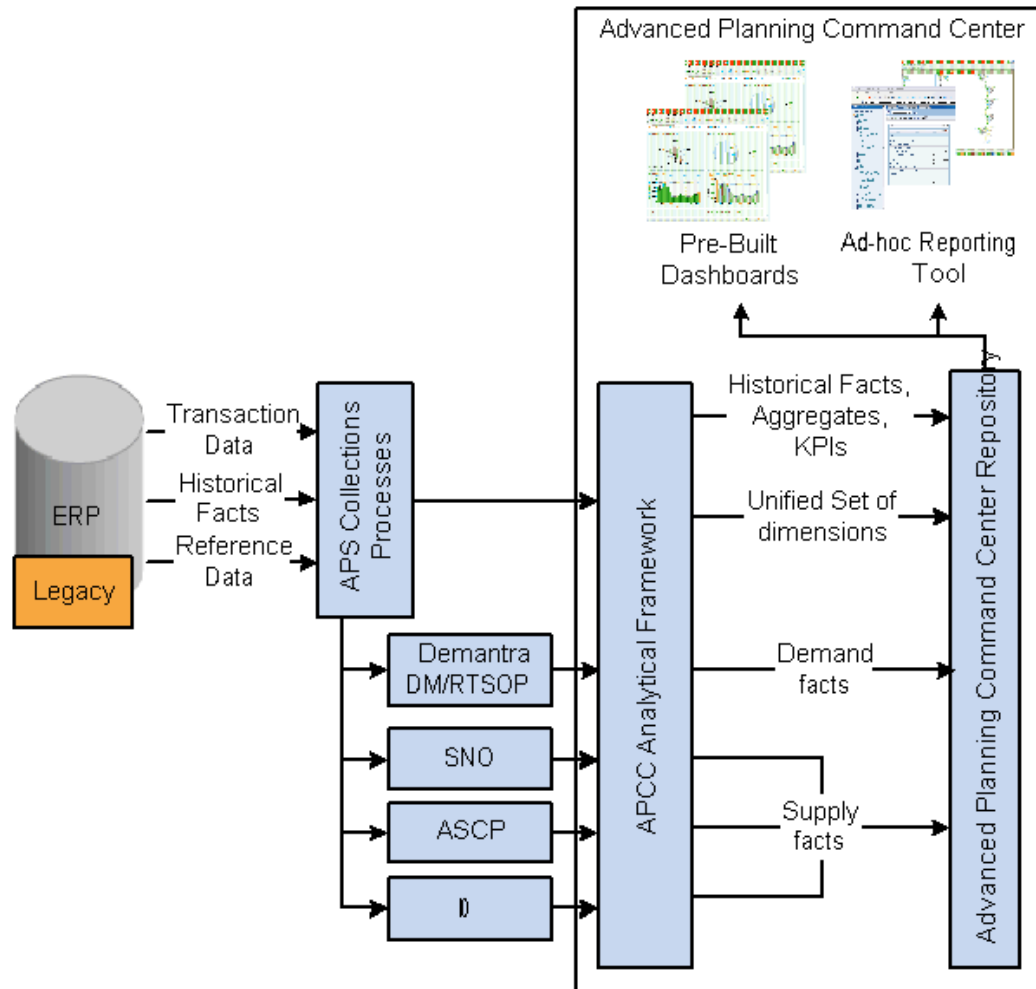
This chapter covers the following topics:

- Understanding the Advanced Planning Command Center Analytical Framework
- Roles
- The Dimension Model
- Measures and Hierarchies
- Dashboards
- Archiving Plans and Scenarios
- APCC Archive Plan Summary
- Setting Your Data for Archiving
- Accessing Item Attributes
- Setting up Profile Options

Understanding the Advanced Planning Command Center Analytical Framework

The Advanced Planning Command Center (APCC) is designed to be the single repository of all planning data generated by multiple Advanced Planning applications. This planning data is the collection of all planning facts and dimensions. It is organized into several functional groups at an aggregate level so that users can analyze key metrics. This enables the user to quickly identify problem areas in any planning scenario and drill to the cause of the problem.

This diagram illustrates the overall architecture of the Advanced Planning Command Center's analytical framework:



The analytical framework provides this functionality:

- It cleanses the data so that all facts have a common set of conforming dimensions.
- It pre-builds aggregates on most of the facts to enable fast and easy reporting.
- It extracts, transforms, and loads the facts into the repository.
- It archives different versions of each measure for trend comparison.
- It combines different facts into composite metrics, or ratios, that are available for users.

The analytical framework delivers the metadata on all the facts, dimensional hierarchies, and the inter-relationships using the Oracle Business Intelligence - Enterprise Edition (OBI-EE) format. This format is saved as an .rpd file. System administrators can use the OBI-EE administration tool, which is not part of this application, to:

- View or modify the metadata.
- Enhance or customize the facts, calculations, and so on.
- Create new facts based on custom data.

Please refer to the most current version of the Oracle Business Intelligence Server Administration Guide for more information on how to use this tool.

Important: Please contact Oracle Support before using the OBI-EE Administrator tool and making any changes to the APCC metadata. Some changes may not be supported during subsequent upgrades.

The analytical framework is designed to answer top business questions such as, "What is the overall impact of a new product launch, by my competitor, on my supply chain?" The analytical framework provides model data from Demand Management and Strategic Network Optimization (SNO) to answer these operational questions in a specific functional area:

Operational Question	Functional Area
Are my inventory levels at the right location, for the right products, within the required levels, and are they stable?	Inventory Analysis
How efficient is my supply chain in minimizing costs and maximizing profits?	Supply Chain Costs
How efficient is the utilization of my manufacturing capacity?	Manufacturing Efficiency

Advanced Planning Applications

The applications that contribute to the APCC planning facts are:

- Advanced Supply Chain Planning (ASCP).
- Inventory Optimization (IO).
- Distribution Requirements Planning (DRP).
- Strategic Network Optimization (SNO).
- Demantra Demand Management.

- Demantra Real-Time Sales and Operations Planning.

Advanced Planning Command Center Objectives

The primary objectives of the APCC application are:

- To provide a consolidated view of all planning-related data.
- To enable a holistic view of the planning problem.
Not just demand-focused or supply-focused.
- To enable an analytical platform to compare all key metrics together such as financial, sales, manufacturing, and so on.
- To enable a unified user interface that provides the ability to drill into individual applications for detailed analysis.
- To bring together all stakeholders, which enables fast reconciliation of conflicting business priorities.

Advanced Planning Command Center Features

The key features of the APCC application are:

- A single repository of all data across all planning applications.
- A unified dimension model that is harmonized for all metrics.
- A rich collection of more than 200 metrics and more than 20 dimension hierarchies.
- Real-time data aggregation, currency conversions, and calculated KPIs.
- Role-specific, prebuilt dashboards that can be customized at the user-level.
- Analysis of multiple scenarios in parallel for what-if simulation.
- Plan archival, which lets users analyze the trends of key metrics in a plan.
- Interactive graphs and pivot tables that can be exported to Microsoft Excel or Adobe Acrobat.

The Analytical Framework

The analytical framework is based on these building blocks:

- Roles.

- Subject areas.
- Dashboards.
- Measures or facts.
- Dimensions and hierarchies.

Each user role has direct access to one dashboard that is available by default. This dashboard is customized with the appropriate analytical content and the primary measures that the role would want to analyze. From the dashboard, users can navigate to multiple areas based on their needs.

Each page in the dashboard contains a set of metrics that analyze a functional area such as inventory analysis.

Dashboards contain all primary measures from a set of work areas and are specific to a user role. For example, the dashboard for an inventory analyst contains primary measures from work areas such as inventory analysis, supply chain costs, and profitability.

The dashboards can be customized at a user level. For example, a vice president of supply chain can have a dashboard consisting of analytical work areas with different levels of aggregation, while a supply chain analysts' dashboard can have more detailed data that is needed for detailed analysis.

Roles

When logging into the Oracle E-Business Suite (EBS) application, the user can quickly navigate to one of the two seeded dashboards, using the seeded role responsibility.

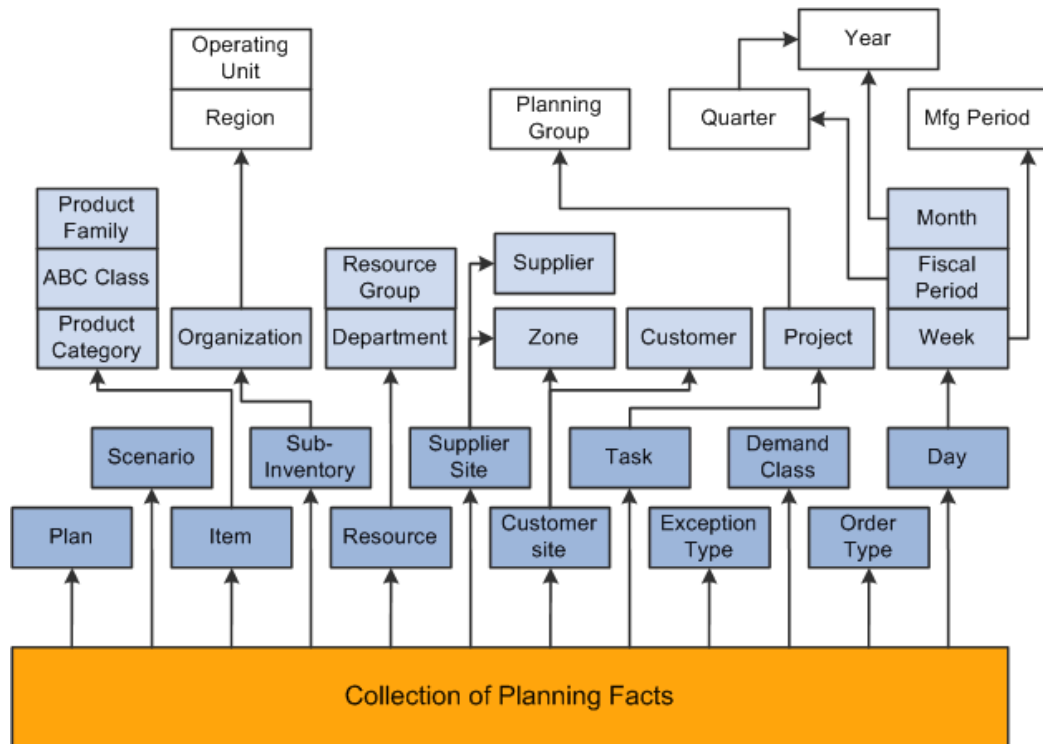
This table lists the seeded role or responsibility and the associated dashboard:

Role or Responsibility	Dashboard
Sales and Operations Planning Analyst	Sales and Operations Planning Dashboard
Supply Chain Analyst	Supply Chain Analyst Dashboard

The Dimension Model

The APCC analytical framework uses a set of common conforming dimensions that are related to the relevant facts.

This diagram illustrates the dimension model that is used to drill into primary and secondary measures:



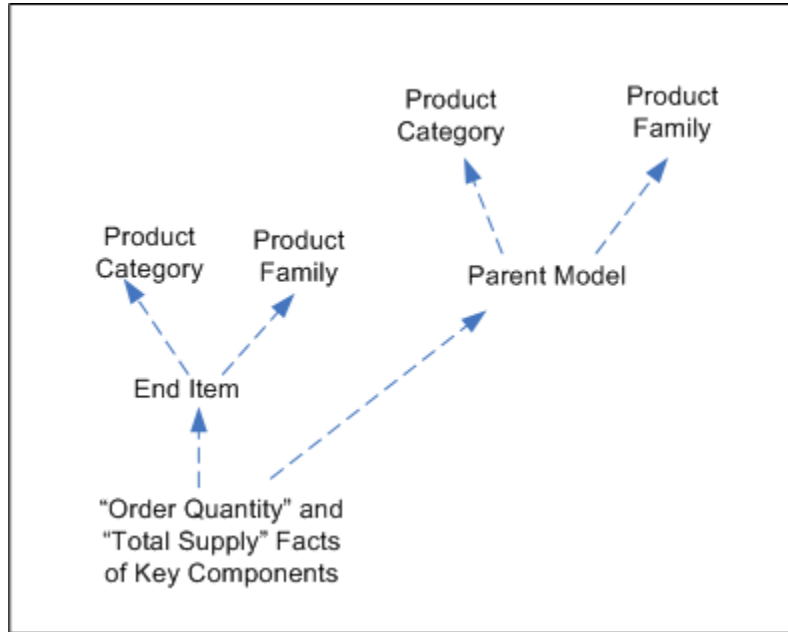
Note: Each fact or measure supports only a subset of these dimensions.

End Items and Parent Model

In addition to the standard dimensions, APCC supports the following optional dimensions that are enabled only as needed.

- End item
- Parent Model (in a Configure to Order environment)

In some cases planners need the ability to analyze components by the specific end item or the model in which they are used. End item and parent model dimensions support this requirement. These are enabled only for Oracle Advanced Supply Chain Planning (ASCP) Plans and not for other supply plan types, for example then are not enabled for SNO, etc. These are enabled only for 2 supply measures, Order Quantity and Total Supply. This feature allows option supplies in an ASCP plan to be grouped by the parent model to which they belong. It also allows supplies in an ASCP plan to be summarized by the end (customer-saleable) model to which they belong. You can build reports for analysis by the Finished Good items based on pegging generated in an ASCP Plan. This feature is available in ASCP Plans only and is enabled for the two measures "order quantity" and "total supply" only.



These End Item and Parent Model dimensions enable APCC to analyze a few supply facts of key components or options for Parent Model.

End Item Dimension

The end item dimension is enabled only for key components that require analysis by the planners using this new dimension.

The key components are identified by a specific category set. All the items that have an item-category assignment in that category set are treated as key components. The name of the category set is set up or defined in the new profile option "MSC: APCC Key Component Category Set". Items that are not critical and do not need this analysis should not have any assignment in this category set.

The following is an example of how to use the category set:

Category Set: INV_ITEMS

Category Set: NEW KC CATEGORY SET

Category: Category 1

- End item A
- End item B
- End item C
- Component C1
- Component C2
- **Key Component KC1**
- **Key Component KC2**

Category: Category KC1

- **Key Component KC1**
- **Key Component KC2**
- **Key Component KC3**
- **Key Component KC4**

Category 2

- End item D
 - End item E
 - End item F
 - **Key Component KC3**
 - **Key Component KC4**
-

In this case, the category set Inv.Items is the general category set used by APCC for all category based reporting and the category set New KC Category Set is for identifying the subset of items that need the End Item dimension enabled. The profiles are set as follows:

MSC: APCC Category Set 1 = Inv.Items

MSC: Key Component Category Set = New KC Category Set

Using this setup, all the items that are not part of the New KC Category Set will not have this new dimension enabled.

The ETL that is necessary to populate this new dimension in the APCC repository is triggered only when the new profile option, MSC: Enable Model & End Item dimensions in APCC, is enabled. If this profile is turned off or is not setup, the necessary ETL is not triggered. The new ETL program is applicable and is triggered only for ASCP plans and Total Supply and Order Quantity facts.

The end item dimension splits the above facts using ASCP's full pegging information by the end item. For example, if there is a Planned Order of 100 on Day1 end pegged to

multiple end items, the fact repository contains the appropriate splits. This enables allows users to build a pivot table report of these types.

Below is an example of reports that have been built by using the new End Item dimension:

Org	Item	End Item	Measure	Wk 1	Wk 2	Wk 3
TST:M1	CM66321	AS66313	Planned Orders	1000	1000	1000
TST:M1		AS18947	Planned Orders	1000	1000	500
TST:M1		AS66312	Planned Orders	200	100	400
TST:M1	CM66321 (Total)	CM66321 (Total)	CM66321 (Total)	2200	2100	1900

Org	End Item	Component Item	Planned Orders	Total Supply
TST:M1	AS66313	CM66321	1000	1000
TST:M1		CM66666	1000	1000
TST:M1		CM66111	200	100

Parent Model Dimension

In an assemble to order environment, it is important to understand how the supplies of different options are being driven by the different models.

The following setups are required to enable this dimension in APCC.

- If the forecast is based on Demantra Demand Management consensus forecast fed into Oracle Advanced Supply Chain Planning, the publish process from Demantra must be configured appropriately. It should publish only the independent forecasts at the Model level, and any other independent demands at lower levels. It should also publish the Planning percentages for the options. The standard seeded data integration profile does not do this.

- The ASCP Plan that is using the forecast as a demand schedule should have the plan option Explode Forecast set to Yes, that is, checked.
- All option classes and options should have the forecast control attribute set to "Consume and Derive".

Users can also combine the two dimensions, Parent Model and End Item, and build reports to slice and dice not only the options but also the components under them, in case the options are make items.

This analysis is limited to the immediate parent model. In case of a multi-level model, this feature gives the ability to analyze only by the immediate parent model.

Using a simple structure, an example is shown below:

Top Model

- Parent Model
 - Option Class
 - Option (Make item)
 - Key Component

Key Component	Parent Model	Shipments	Planned Orders	Total
8GB PC2-5300 240-PIN RDIMM RAM	Sun Sparc M4000	100,000	200,000	300,000
	Sun Sparc M5000	30,000	10,000	40,000
	Sun Sparc M8000	500,000	1,000,000	1,500,000
		630,000	1,210,000	1,840,000

New Dimensions Profile Options

Two new profile options support the new dimensions:

1. MSC: APCC Key Component Category Set

Description: The name of the category set that identifies the items (like key components) and their categories that will have new dimensions of End Item and Parent Model enabled in APCC repository.

Site: Can be set at site, responsibility or user level

2. MSC: Enable Model & End Item dimensions in APCC

Description: Enables or disables the ETL processing required to populate the end item and parent model dimensions in the APCC. When set to 'Yes', the ETL is enabled. When set to 'No', the ETL is disabled.

Site: Can be set at site, responsibility or user level.

Measures and Hierarchies

Measures are grouped into functional areas in order to keep them organized.

The functional areas are:

- Inventory Analysis.
- Overall Plan Health.
- Supply Chain Costs and Profitability.
- Replenishment Planning.
- Demand Satisfaction.
- Manufacturing Efficiency.
- Sourcing Efficiency.
- Forecasting.
- Network Design.
- Integration with Oracle Rapid Planning

Custom Product Hierarchies

APCC supports direct upload of a 10-level custom product hierarchy that is sourced from Demantra, using the profile MSC: Additional Item Hierarchy in APCC. When you have set up this profile, you must run the concurrent program Refresh APCC Materialized Views. This profile allows uploads for both Demantra and .csv files.

Note: The profile MSC: Additional Item hierarchy in APCC is the rename of profile MSC: Additional Demantra Item hierarchy in APCC

Custom Hierarchies and Other Dimensions

APCC allows sourcing one custom hierarchy each, to a maximum of 10 levels each, in

Customer (Site) and Organization dimension from Demantra directly using profiles MSC: Additional Customer Hierarchy in APCC and MSC: Additional Organization Hierarchy in APCC. After setting up these profiles, you must run the concurrent program Refresh APCC Materialized Views.

In addition APCC also supports direct upload of these 10-level hierarchies using .csv files.

Uploading Custom Hierarchies

The direct upload of the 10-level hierarchy requires two .csv files, one is for the structure and one is for the data. The .csv files have the format described in this example of a five level product hierarchy.

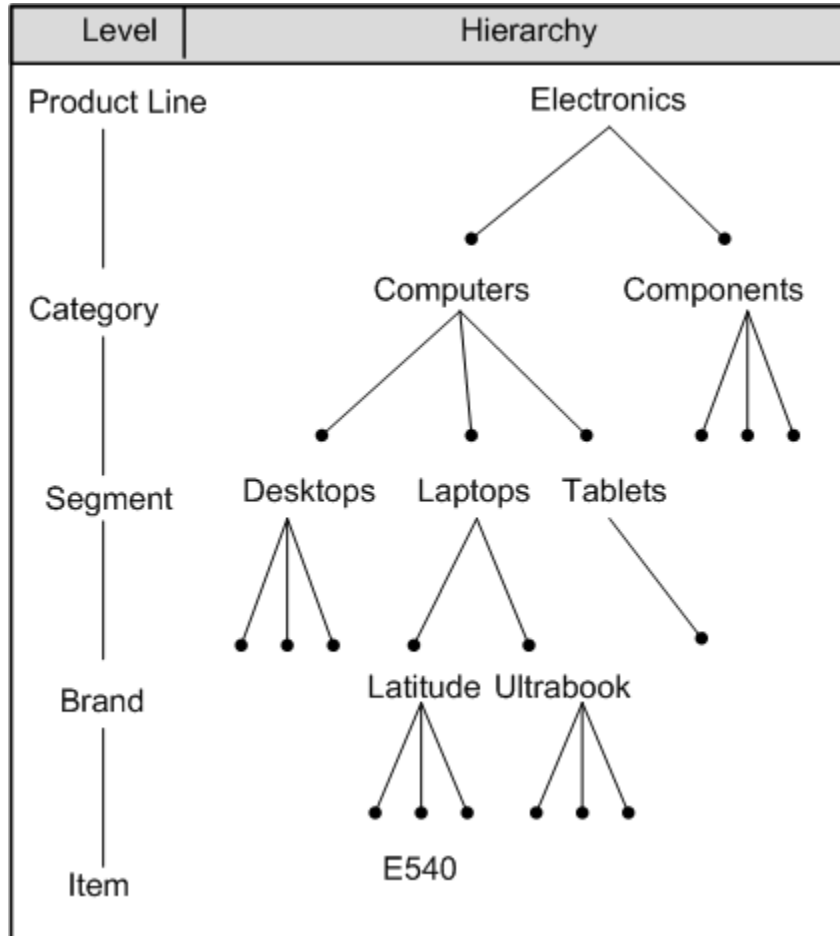
Level 5 is Product Line: Electronics

Level 4 is Category: Computers and Components

Level 3 is Segment: Under Computers are Desktops, Laptops, and Tablets. Components from Level 2 have no Level 3 items.

Level 2 is Brand: Desktops has no items; under Laptops are Latitude, and Ultrabook. Tablets from Level 2 has no Level 3 items. Base Level is Item: Under Latitude is E540. There are no other Items from Level 4.

Base Level is Item: Under Latitude is E540. There are no other Items from Level 4.



CustomHierarchyStructure.csv represents the .csv file. The first row is a required header row:

```
Dimension,Hierarchy,Level1,Level2,Level3,Level4,Level5,Level6,Level7,Level8,Level9,Level10
Product,Custom Hierarchy 1,Item,Brand,Segment,Category,Product Line,,,,,,,
```

The file upload requires the following criteria:

- Upload is always full and replaces the earlier definition.
- You can upload multiple hierarchies in any given dimension. At a given point in time a single custom hierarchy, per dimension, can be used, based on the new profiles.
- A modification to the structure deletes the associated hierarchy data.
- You can upload multiple hierarchies using the CustomHierarchyStructure.csv file.
- Hierarchy names must be unique across all dimensions.

- Level Names must be unique within a hierarchy
- Level Name labels are stored in the uploaded language and not translated.

The first row of the CustomHierarchyData.csv file requires a header.

```
Hierchy,Level,Value,Patent Value
Custom Hierarchy 1,Item,E540,Latitude
Custom Hierarchy 1,Brand,Latitude,Laptops
Custom Hierarchy 1,Category,Computers,Electronics
.....
```

Uploading the .csv File

When you upload your .csv file, remember:

- You can upload data from multiple hierarchies in a single.csv upload
- The lowest level member (Item, Customer Site, Organization) must exist in the system as either collections or legacy uploads. You cannot create new items, customer sites, or organizations using this .csv file upload. The upload generates an error if the lowest level member does not exist in the system.
- Upload is always incremental. In a hierarchy, if value has an existing parent, the new parent replaces it. If the value does not have a parent in this hierarchy, it creates a new association.
- A level value cannot be associated to multiple parents.
- The system does not permit any ragged or skipped levels. That is, in a hierarchy all members of a level must have the same number of ancestors.

Custom Measures

APCC supports 10 new custom measures for supply plans at the following granularity: Item, Org, Date, Supplier Site, Source Org, Order Type. Item and Org are the only required dimensions. The measures can be Non-Plan or Plan-specific, as determined by the selection of Plan Type in your upload.

You can populate data for these custom measures in one of two ways:

- A batch process. You use the APCC ETL hook for plan-specific measures or the Collections hook for non plan-specific measures to write custom logic to populate these measures.
- Use the new .csv file, CustomSupplyMeasures.csv, to upload data directly.

When you use the .csv file to upload the measures, the mapping is automatically created by using the available ATTRIBUTE1..n columns.

All of the supply plan types supported by APCC support these custom measures.

Uploading Custom Measures

You upload custom measures in a single .csv file in the format shown below. The first row is a required header row.

CustomSupplyMeasures.csv

```
MeasureName,Item,Org,Date,SourceOrg,SupplierSite,OrderType,MeasureValue  
PO Receipts,E540,M1,02-Mar-2014,,AcmeEngineering,,1200  
. . . . .
```

The upload process and validations include the following:

- Date format is expected to be in the default user format.
- All uploads include dimension value names, no IDs.
- The upload UI allows you to indicate if this is a New, Replace or Append action.
 - New means a new version of the Plan will be created.
 - Append means data will be added to existing measure data of the latest version.
 - Replace means existing latest version will be replaced by the uploaded data.
- All errors are written into a log. The upload process continues with the remaining rows and skips the errors. You can fix and re-submit the error rows in the Append mode.
- You can use OBIEE Answers to validate the uploaded data

The current upload user interface, Load Fact Data from External Systems, which is accessible from Advanced Planning Scenario Manager responsibility, is renamed Load APCC Data and modified to support the upload of Custom Hierarchies and Custom Measures, in addition to the standard measures.

New Measures

There are two new measures for APCC:

- Projected On Hand
- Total Demand Fulfilled

Projected On Hand Value and Projected On Hand Value – Reporting Currency

APCC supports the "Projected On Hand" measure for doing days of cover analysis using Projected On Hand. This enhancement lets you perform analysis without any need for customization.

In addition to Projected On Hand, APCC adds two related measures:

- Projected On Hand Value
- Projected On Hand Value – Reporting Currency

These measures are the value versions in functional and reporting currency respectively, and share the same dimensionality and aggregation rule as the base unit measure.

Measure Specifications

- Measure Name: Projected On Hand
- Measure Group (Folder): Inventory Analysis
- Meaning: Expected on hand quantity (in units) on a given day based on beginning on hand and current scheduled receipts based on due dates prior to the plan run and not including any planned orders, reschedules or cancellations.
- Dimensionality: Item, Organization, Date
- Aggregation Rule: Sum (by all dimensions except Time), Last (by Time)
- Calculated in Plan Types: ASCP, RP

Note: This measure is not currently included in any of the existing out-of-box reports.

Total Demand Fulfilled

APCC supports the ability to enable a time-phased view of exact fulfilled demand. This feature is currently not available in ASCP, APCC or Demantra. You use this measure in the Build Plan Report.

Measure Specification:

- Measure Name: Total Demand Fulfilled
- Measure Group: Demand Satisfaction
- Meaning: Sum of Pegged Supply Qty (to all demands across all End Items)
- Dimensionality: Item, Organization, Date
- Aggregation Rule: Sum (by all dimensions)
- Calculated in Plan Types: ASCP, RP

Note: This feature is similar to Constrained Forecast, which is

calculated using Quantity Satisfied by Due Date. It differs in that this new measure provides exact fulfillment dates, based on pegging, unlike Constrained Forecast

Note: This measure differs from other pegging related measures, such as in that it is not based on end demand order types.

The Inventory Analysis Functional Area

This table lists the primary measures of the Inventory Analysis functional area:

Measure	Description	Conforming Dimensions	Aggregate Rules
Projected available balance - value (functional currency)	Projected Available Balance value in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Last
Projected available balance - value in IO plan (functional currency)	Projected Available Balance value in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Last
Projected available balance - value (reporting currency)	Projected Available Balance value in reporting currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Last
Projected available balance - value in IO plan (reporting currency)	Projected Available Balance value in reporting currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Last
Projected available balance - units	Projected Available Balance - quantity	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Last

Measure	Description	Conforming Dimensions	Aggregate Rules
Projected available balance - units in IO plan	Projected Available Balance - quantity	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Last
Projected available balance - days of cover	Ratio (percentage) of Projected Available Balance (quantity) to average demand in the plan	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Last
Projected available balance - days of cover in IO plan	Ratio (percentage) of Projected Available Balance (quantity) to average demand in the plan	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Last
Projected available balance - % of total demand	Ratio (percentage) of Projected Available Balance (quantity) to total demand in the plan	Scenario, Plan, Organization, Item, Time	All dimensions except time = not applicable Time dimension = not applicable
Projected available balance - % of total demand in IO plan	Ratio (percentage) of Projected Available Balance (quantity) to total demand in the plan	Scenario, Plan, Organization, Item, Time	All dimensions except time = not applicable Time dimension = not applicable
Carrying Cost – value (functional currency)	Carrying cost value in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Carrying Cost – value in IO plan (functional currency)	Carrying cost value in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimensions	Aggregate Rules
Carrying Cost – value (reporting currency)	Carrying cost value in reporting currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Carrying Cost – value in IO plan (reporting currency)	Carrying cost value in reporting currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Supplies pegged to excess	The quantity of supplies pegged to excess demand	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Stock outs	Number of times projected available balance is expected to be negative	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Projected available balance - % of safety stock	Projected Available Balance - quantity measured as percentage of required safety stock.	Scenario, Plan, Organization, Item, Time	All dimensions except time = not applicable Time dimension = not applicable
Projected available balance - % of safety stock in IO plan	Projected Available Balance - quantity measured as percentage of required safety stock.	Scenario, Plan, Organization, Item, Time	All dimensions except time = not applicable Time dimension = not applicable
Fill rate	Fill rate of the end demands based on quantity satisfied on time (for ASCP, SRP, DRP, SNO plans)	Scenario, Plan, Organization, Item, Time, Customer, Demand class	All dimensions except time = Avg Time dimension = Avg

Measure	Description	Conforming Dimensions	Aggregate Rules
Service level	Service Level (achieved) based on quantity satisfied on time (only in case of IO plans)	Scenario, Plan, Organization, Item, Time, Customer, Demand class	All dimensions except time = Avg Time dimension = Avg
Inventory turns	Ratio of annualized cost of goods sold to average projected available balance	Scenario, Plan, Organization, Item, Time	All dimensions except time = Avg Time dimension = Avg
Inventory turns in IO plan	Ratio of annualized cost of goods sold to average projected available balance	Scenario, Plan, Organization, Item, Time	All dimensions except time = Avg Time dimension = Avg
Total Supply	Sum of all supplies	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Total Demand	Sum of all demands	Scenario, Plan, Organization, Item, Time, Customer	All dimensions except time = Sum Time dimension = Sum
Planned Orders	Recommended planned order quantity	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Scheduled Receipts	Scheduled Receipt quantity from current open supplies	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimensions	Aggregate Rules
On hand	Beginning on hand	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
On hand in IO plan	Beginning on hand	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Minimum Inventory Level	Minimum inventory level	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Last
Maximum Inventory Level	Maximum inventory level	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Last
Safety stock	Safety stock quantity	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Last
Safety stock in IO plan	Safety stock quantity	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Last
Order Quantity	Order quantity	Scenario, Plan, Organization, Item, Time, Priority, Customer, Supplier, Ship method, Demand class, Order type, Project	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimensions	Aggregate Rules
Order Quantity in IO plan	Order quantity	Scenario, Plan, Organization, Item, Time, Priority, Customer, Supplier, Ship method, Demand class, Order type, Project	All dimensions except time = Sum Time dimension = Sum

The Overall Plan Health Functional Area

This table lists the primary measures of the Overall Plan Health functional area:

Measure	Description	Conforming Dimensions	Aggregate Rules
Exceptions - Count	Exceptions - Count	Scenario, Plan, Organization, Item, Resource, Time, Customer, Supplier, Exception Type, Project	All dimensions except time = Sum Time dimension = Sum
Exceptions - Value (functional currency)	Exceptions - Value in functional currency	Scenario, Plan, Organization, Item, Resource, Time, Customer, Supplier, Exception Type, Project	All dimensions except time = Sum Time dimension = Sum
Exceptions - Value (reporting currency)	Exceptions - Value in reporting currency	Scenario, Plan, Organization, Item, Resource, Time, Customer, Supplier, Exception Type, Project	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimensions	Aggregate Rules
Exceptions - Days	Exceptions - Days	Scenario, Plan, Organization, Item, Resource, Time, Customer, Supplier, Exception Type, Project	All dimensions except time = Sum Time dimension = Sum
Exceptions - Quantity	Exceptions - Quantity	Scenario, Plan, Organization, Item, Resource, Time, Customer, Supplier, Exception Type, Project	All dimensions except time = Sum Time dimension = Sum
Exceptions - Ratio	Exceptions - Quantity	Scenario, Plan, Organization, Item, Resource, Time, Customer, Supplier, Exception Type, Project	All dimensions except time = Avg Time dimension = Avg
Safety Stock violations	Number of times the inventory fell below safety stock	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Use Alternate Sources (count)	Number of times alternate sources were recommended	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Use Alternate Suppliers (count)	Number of times alternate suppliers were recommended	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Planned Orders within Planning Time Fence	Number of planned orders within the planning time fence	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimensions	Aggregate Rules
Planned Orders exceeding Order Modifiers	Number of planned orders with quantity more than order modifier quantity	Scenario, Plan, Organization, Item, Time, Supplier, Project	All dimensions except time = Sum Time dimension = Sum
Planned Orders created before work orders	Number of planned orders created before an existing work order	Scenario, Plan, Organization, Item, Time, Supplier, Project	All dimensions except time = Sum Time dimension = Sum
Planned Orders	Planned order quantity	Scenario, Plan, Organization, Item, Resource, Time	All dimensions except time = Sum Time dimension = Sum
Independent Dem Qty	End demand quantity	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Dependent Dem Qty	Intermediate demand quantity	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Items with no activity	Number of items with no activity	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Avg Qty of supply pegged to highest priority dem	Avg Qty of supply pegged to highest priority dem	Scenario, Plan, Organization, Item	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimensions	Aggregate Rules
Late Demand Satisfaction factor	Demand lateness measured as quantity of end demands unmet on due date times the number of days late	Scenario, Plan, Organization, Item, Time, Priority, Customer, Demand class	All dimensions except time = Sum Time dimension = Sum
Production to plan	Percentage of actual production to planned production	Scenario, Plan, Organization, Item, Time	All dimensions except time = not applicable Time dimension = not applicable
Shipments to plan	Percentage of actual shipments to planned shipments	Scenario, Plan, Organization, Item, Time	All dimensions except time = not applicable Time dimension = not applicable

The Supply Chain Costs and Profitability Functional Area

This table lists the primary measures of the Supply Chain Costs and Profitability functional area:

Measure	Description	Conforming Dimensions	Aggregate Rules
Revenues (functional currency)	Revenues (in functional currency)	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Revenues (functional currency) in IO plan	Revenues (in functional currency)	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimensions	Aggregate Rules
Revenues (reporting currency)	Revenues (in reporting currency)	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Revenues (reporting currency) in IO plan	Revenues (in reporting currency)	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Revenues (functional currency) - Cum	Cumulative Revenues (in functional currency)	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Revenues (functional currency) in IO plan - Cum	Cumulative Revenues (in functional currency)	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Revenues (reporting currency) - Cum	Cumulative Revenues (in reporting currency)	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Revenues (reporting currency) in IO plan - Cum	Cumulative Revenues (in reporting currency)	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Gross Margin %	Gross margin (percentage)	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimensions	Aggregate Rules
Gross Margin % in IO plan	Gross margin (percentage)	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Cum Gross Margin %	Cumulative Gross margin (percentage)	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Cum Gross Margin % in IO plan	Cumulative Gross margin (percentage)	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Gross Margin (functional currency)	Gross margin in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Gross Margin (functional currency) in IO plan	Gross margin in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Gross Margin (reporting currency)	Gross margin in reporting currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Gross Margin (reporting currency) in IO plan	Gross margin in reporting currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimensions	Aggregate Rules
Gross Margin (functional currency) - Cum	Cumulative Gross margin in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Gross Margin (functional currency) in IO plan - Cum	Cumulative Gross margin in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Gross Margin (reporting currency) - Cum	Cumulative Gross margin in reporting currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Gross Margin (reporting currency) in IO plan - Cum	Cumulative Gross margin in reporting currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = not applicable Time dimension = not applicable
Sales / Avg Inventory value	Ratio of actual sales to average inventory value	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Total Supply Chain costs (functional currency)	Sum of manufacturing, purchasing, transportation and carrying costs in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Total Supply Chain costs in IO plan (functional currency)	Sum of manufacturing, purchasing, transportation and carrying costs in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimensions	Aggregate Rules
Total Supply Chain costs (reporting currency)	Sum of manufacturing, purchasing, transportation and carrying costs in reporting currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Total Supply Chain costs in IO plan (reporting currency)	Sum of manufacturing, purchasing, transportation and carrying costs in reporting currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Total Supply Chain costs (functional currency) - cum	Cumulative Sum of manufacturing, purchasing, transportation and carrying costs in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Total Supply Chain costs in IO plan (functional currency) - cum	Cumulative Sum of manufacturing, purchasing, transportation and carrying costs in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Total Supply Chain costs (reporting currency) - Cum	Cumulative Sum of manufacturing, purchasing, transportation and carrying costs in reporting currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Total Supply Chain costs in IO plan (reporting currency) - Cum	Cumulative Sum of manufacturing, purchasing, transportation and carrying costs in reporting currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimensions	Aggregate Rules
Total Supply Chain costs - % of revenue	Total Supply Chain costs - % of revenue	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Total Supply Chain costs - % of revenue in IO plan	Total Supply Chain costs - % of revenue in IO plan	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Carrying Cost (functional currency)	Carrying cost value in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Carrying Cost (functional currency) in IO plan	Carrying cost value in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Carrying Cost (reporting currency)	Carrying cost value in reporting currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Carrying Cost (reporting currency) in IO plan	Carrying cost value in reporting currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Carrying Cost (functional currency) - Cum	Cumulative Carrying cost value in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimensions	Aggregate Rules
Carrying Cost (functional currency) in IO plan - Cum	Cumulative Carrying cost value in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Carrying Cost (reporting currency) - Cum	Cumulative Carrying cost value in reporting currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Carrying Cost (reporting currency) in IO plan - Cum	Cumulative Carrying cost value in reporting currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Variance of PAB over mean	Variance of PAB over mean	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Manufacturing cost (functional currency)	Manufacturing cost value in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Manufacturing cost (functional currency) in IO plan	Manufacturing cost value in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Manufacturing cost (reporting currency)	Manufacturing cost value in reporting currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimensions	Aggregate Rules
Manufacturing cost (reporting currency) in IO plan	Manufacturing cost value in reporting currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Purchasing cost (functional currency)	Purchasing cost value in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Purchasing cost (functional currency) in IO plan	Purchasing cost value in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Purchasing cost (reporting currency)	Purchasing cost value in reporting currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Purchasing cost (reporting currency) in IO plan	Purchasing cost value in reporting currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Resource cost in functional currency	Resource cost value in functional currency	Scenario, Plan, Organization, Resource, Time	All dimensions except time = Sum Time dimension = Sum
Resource cost in reporting currency	Resource cost value in reporting currency	Scenario, Plan, Organization, Resource, Time	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimensions	Aggregate Rules
Transportation cost (functional currency)	Transportation cost value in functional currency	Scenario, Plan, Organization, Item, Time, Ship method	All dimensions except time = Sum Time dimension = Sum
Transportation cost (functional currency) in IO plan	Transportation cost value in functional currency	Scenario, Plan, Organization, Item, Time, Ship method	All dimensions except time = Sum Time dimension = Sum
Transportation cost (reporting currency)	Transportation cost value in reporting currency	Scenario, Plan, Organization, Item, Time, Ship method	All dimensions except time = Sum Time dimension = Sum
Transportation cost (reporting currency) in IO plan	Transportation cost value in reporting currency	Scenario, Plan, Organization, Item, Time, Ship method	All dimensions except time = Sum Time dimension = Sum
Manufacturing cost (functional currency) - Cum	Cumulative Manufacturing cost value in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Manufacturing cost (functional currency) in IO plan - Cum	Cumulative Manufacturing cost value in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Manufacturing cost (reporting currency) - Cum	Cumulative Manufacturing cost value in reporting currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimensions	Aggregate Rules
Manufacturing cost (reporting currency) in IO plan - Cum	Cumulative Manufacturing cost value in reporting currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Purchasing cost (functional currency) - Cum	Cumulative Purchasing cost value in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Purchasing cost (functional currency) in IO plan - Cum	Cumulative Purchasing cost value in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Purchasing cost (reporting currency) - Cum	Cumulative Purchasing cost value in reporting currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Purchasing cost (reporting currency) in IO plan - Cum	Cumulative Purchasing cost value in reporting currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Resource cost in functional currency - Cum	Cumulative Resource cost value in functional currency	Scenario, Plan, Organization, Resource, Time	All dimensions except time = Sum Time dimension = Sum
Resource cost in reporting currency - Cum	Cumulative Resource cost value in reporting currency	Scenario, Plan, Organization, Resource, Time	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimensions	Aggregate Rules
Transportation cost (functional currency) - Cum	Cumulative Transportation cost value in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Transportation cost (functional currency) in IO plan - Cum	Cumulative Transportation cost value in functional currency	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Transportation cost (reporting currency) - Cum	Transportation cost value in reporting currency	Scenario, Plan, Organization, Item, Time, Ship method	All dimensions except time = Sum Time dimension = Sum
Transportation cost (reporting currency) in IO plan - Cum	Transportation cost value in reporting currency	Scenario, Plan, Organization, Item, Time, Ship method	All dimensions except time = Sum Time dimension = Sum

The Replenishment Planning Functional Area

This table lists the primary measures of the Replenishment Planning functional area:

Measure	Description	Conforming Dimensions	Aggregate Rules
VMI Inventory – value (functional currency)	Projected Available Balance value (in functional currency) of vendor managed items	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Last
VMI Inventory – value (reporting currency)	Projected Available Balance value (in reporting currency) of vendor managed items	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Last

Measure	Description	Conforming Dimensions	Aggregate Rules
VMI Inventory - % of total inventory	Ratio (percentage) of projected available balance value in {functional currency} of vendor managed items to the total projected available balance of all items.	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Last
VMI items stockout days	Sum of stock out days of vendor managed items	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
VMI items service level	Fill rate of the end demands of vendor managed items based on quantity satisfied on time	Scenario, Plan, Organization, Item, Time, Customer, Demand class	All dimensions except time = Avg Time dimension = Avg

The Demand Satisfaction Functional Area

This table lists the primary measures of the Demand Satisfaction functional area:

Measure	Description	Conforming Dimensions	Aggregate Rules
Late orders ratio (count)	Demand lateness measured as the percentage of number of end demand lines unmet on due date	Scenario, Plan, Organization, Item, Time, Priority, Customer, Demand class	All dimensions except time = not applicable Time dimension = not applicable
Late Orders ratio (value)	Demand lateness measured as the percentage of value of end demand lines unmet on due date	Scenario, Plan, Organization, Item, Time, Priority, Customer, Demand class	All dimensions except time = not applicable Time dimension = not applicable

Measure	Description	Conforming Dimensions	Aggregate Rules
Late Sales Orders (count)	Number of sales order lines that are satisfied late.	Scenario, Plan, Organization, Item, Time, Customer	All dimensions except time = Sum Time dimension = Sum
Late Sales Orders (days)	Number of days late of the sales orders lines that are satisfied late.	Scenario, Plan, Organization, Item, Time, Customer	All dimensions except time = Sum Time dimension = Sum
Late Sales Orders (value) - functional currency	Value of sales order lines that are satisfied late.	Scenario, Plan, Organization, Item, Time, Customer	All dimensions except time = Sum Time dimension = Sum
Late Sales Orders (value) - reporting currency	Value (in reporting currency) of sales order lines that are satisfied late.	Scenario, Plan, Organization, Item, Time, Customer	All dimensions except time = Sum Time dimension = Sum
Late Forecasts (count)	Number of forecasts that are satisfied late.	Scenario, Plan, Organization, Item, Time, Customer	All dimensions except time = Sum Time dimension = Sum
Target Service Level	Target Service level of the end demands.	Scenario, Plan, Organization, Item, Time, Priority, Customer, Demand class	All dimensions except time = min Time dimension = min
Target Service Level in IO plan	Target Service level of the end demands.	Scenario, Plan, Organization, Item, Time, Priority, Customer, Demand class	All dimensions except time = min Time dimension = min

Measure	Description	Conforming Dimensions	Aggregate Rules
Service Level	Service Level (achieved) based on quantity satisfied on time (only in case of IO plans)	Scenario, Plan, Organization, Item, Time, Priority, Customer, Demand class	All dimensions except time = not applicable Time dimension = not applicable
Line Fill rate (count)	Fill rate of the end demands measured as a percentage of number of lines at least partially satisfied on time	Scenario, Plan, Organization, Item, Time, Priority, Customer, Demand class	All dimensions except time = not applicable Time dimension = not applicable
Perfect Order Index	Fill rate of the end demands measured as a multiple of two factors - percentage of end demands met on time (even partial quantity) and percentage of end demands met in full quantity (even late)	Scenario, Plan, Organization, Item, Time, Priority, Customer, Demand class	All dimensions except time = Sum Time dimension = Sum
Unmet Demand history	Unmet Demand quantity for the past	Scenario, Plan, Organization, Item, Time, Priority, Customer	All dimensions except time = Sum Time dimension = Sum
Unmet Demand	Unmet Demand quantity - projected	Scenario, Plan, Organization, Item, Time, Priority, Customer	All dimensions except time = Sum Time dimension = Sum
Unmet Revenue (functional currency)	Value of sales orders not satisfied by due date (in functional currency)	Scenario, Plan, Organization, Item, Time, Priority, Customer, Demand class	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimensions	Aggregate Rules
Unmet Revenue (functional currency) in IO plan	Value of sales orders not satisfied by due date (in functional currency)	Scenario, Plan, Organization, Item, Time, Priority, Customer, Demand class	All dimensions except time = Sum Time dimension = Sum
Unmet Revenue (reporting currency)	Value of sales orders not satisfied by due date (in reporting currency)	Scenario, Plan, Organization, Item, Time, Priority, Customer, Demand class	All dimensions except time = Sum Time dimension = Sum
Unmet Revenue (reporting currency) in IO plan	Value of sales orders not satisfied by due date (in reporting currency)	Scenario, Plan, Organization, Item, Time, Priority, Customer, Demand class	All dimensions except time = Sum Time dimension = Sum
Past Due Backlog quantity	Backlog of unmet sales orders measured as quantity requested less quantity satisfied (cumulative)	Scenario, Plan, Organization, Item, Time, Priority, Customer, Demand class	All dimensions except time = Sum Time dimension = Sum
Sales Orders scheduled within request date (% of total)	Percentage of number of sales orders scheduled within requested date.	Scenario, Plan, Organization, Item, Time, Priority, Customer, Demand class	All dimensions except time = Sum Time dimension = Sum
Sales Orders beyond acceptable date (%)	Percentage of number of sales orders scheduled beyond acceptable date	Scenario, Plan, Organization, Item, Time, Priority, Customer, Demand class	All dimensions except time = Sum Time dimension = Sum

The Manufacturing Efficiency Functional Area

This table lists the primary measures of the Manufacturing Efficiency functional area:

Measure	Description	Conforming Dimensions	Aggregate Rules
Resource availability	Resource availability measured as resource hours x capacity units	Scenario, Plan, Organization, Resource, Time	All dimensions except time = Sum Time dimension = Sum
Resource requirements	Resource requirements measured as required hours x assigned units	Scenario, Plan, Organization, Resource, Time	All dimensions except time = Sum Time dimension = Sum
Net Resource Availability	Net Resource availability after meeting the requirements	Scenario, Plan, Organization, Resource, Time	All dimensions except time = Sum Time dimension = Sum
Cum Net Resource Availability	Cum Net Resource availability till date	Scenario, Plan, Organization, Resource, Time	All dimensions except time = Sum Time dimension = Last
Resource utilization %	Resource utilization as a ratio (percentage) of resource requirements to resource availability	Scenario, Plan, Organization, Resource, Time	All dimensions except time = not applicable Time dimension = not applicable
Resource Overloaded (ratio)	The average load ratio for the overloaded resources	Scenario, Plan, Organization, Item, Resource, Time	All dimensions except time = Avg Time dimension = Avg
Production plan	Quantity of make orders that are due in this bucket.	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimensions	Aggregate Rules
WIP start quantity	Quantity of make orders that start in this bucket.	Scenario, Plan, Organization, Item, Time	All dimensions except time = Avg Time dimension = Avg
Avg make order qty - % of Avg daily demand	Make order frequency - measured as a ratio (percentage) average make order quantity to the average daily demand in the plan	Scenario, Plan, Organization, Item, Time	All dimensions except time = Avg Time dimension = Avg
Setup time - % of total hours	Ratio (percentage) of setup resource hours to the total resource requirements	Scenario, Plan, Organization, Resource, Time	All dimensions except time = Avg Time dimension = Avg
Cycle time	Average cycle time taken per order	Scenario, Plan, Organization, Item, Resource, Time	All dimensions except time = Avg Time dimension = Avg
Throughput rate	Average quantity per hour	Scenario, Plan, Organization, Item, Resource, Time	All dimensions except time = Avg Time dimension = Avg
Planned mfg lead time (% of estimate)	Average planned lead time as percentage of estimated lead time	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum

The Sourcing Efficiency Functional Area

This table lists the primary measures of the Sourcing Efficiency functional area:

Measure	Description	Conforming Dimensions	Aggregate Rules
PO reschedules - % of total POs	Number of purchase orders rescheduled as a percentage of the total purchase orders	Scenario, Plan, Organization, Item, Time, Supplier	All dimensions except time = Sum Time dimension = Sum
Rescheduled Orders (days)	Total days of all Purchase orders, work orders that are recommended to be rescheduled	Scenario, Plan, Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
PO cancellations - % of total POs	Number of purchase orders cancelled as a percentage of the total purchase orders	Scenario, Plan, Organization, Item, Time, Supplier	All dimensions except time = Sum Time dimension = Sum
Supplier spend (functional currency)	New buy order value in functional currency	Scenario, Plan, Organization, Item, Time, Supplier	All dimensions except time = Sum Time dimension = Sum
Supplier spend (reporting currency)	New buy order value in reporting currency	Scenario, Plan, Organization, Item, Time, Supplier	All dimensions except time = Sum Time dimension = Sum
Total buy orders – count	Number of new buy orders	Scenario, Plan, Organization, Item, Time, Supplier	All dimensions except time = Sum Time dimension = Sum
Supply volume	Order Quantity of all buy and transfer orders	Scenario, Plan, Organization, Item, Time, Supplier, Source	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimensions	Aggregate Rules
Supplier Capacity Available	Supplier Capacity available (gross) in units	Scenario, Plan, Organization, Item, Time, Supplier	All dimensions except time = Sum Time dimension = Sum
Supplier Capacity Required	Supplier Capacity required in units	Scenario, Plan, Organization, Item, Time, Supplier	All dimensions except time = Sum Time dimension = Sum
Supplier capacity net available (cum)	Supplier Capacity available (net) in units	Scenario, Plan, Organization, Item, Time, Supplier	All dimensions except time = Sum Time dimension = First
Supplier capacity utilization %	Ratio (percentage) of supplier capacity required to availability	Scenario, Plan, Organization, Item, Time, Supplier	All dimensions except time = Avg Time dimension = Avg
Buys from a non-rank - 1 supplier (%)	Number of new buy orders placed on a non-rank - 1 supplier as a percentage of total new buy orders	Scenario, Plan, Organization, Item, Time, Supplier	All dimensions except time = not applicable Time dimension = not applicable
Avg buy order qty - % of Avg daily demand	Average new buy order quantity as a percentage of average daily demand	Scenario, Plan, Organization, Item, Time, Supplier	All dimensions except time = Avg Time dimension = Avg
Count of items single sourced	count of items single sourced	Scenario, Plan, Organization, Item, Time, Supplier	All dimensions except time = Avg Time dimension = Avg

The Forecasting Functional Area

This table lists the primary measures of the Forecasting functional area:

Measure	Description	Conforming Dimension	Aggregate Rules
Forecast accuracy %	Forecast Accuracy percentage	not applicable	not applicable
Demand priority	Demand Priority	not applicable	not applicable
Consensus forecast	Consensus forecast quantity	Scenario, Plan, Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Consensus forecast - value (functional currency)	Consensus forecast value in functional currency	Scenario, Plan, Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Consensus forecast - value (reporting currency)	Consensus forecast value in reporting currency	Scenario, Plan, Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Consensus forecast - cum	Cumulative consensus forecast quantity	Scenario, Plan, Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = not applicable Time dimension = not applicable
Sales Forecast	Sales forecast quantity	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimension	Aggregate Rules
Sales Forecast - value (functional currency)	Sales forecast value in {functional currency}	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Sales Forecast - value (reporting currency)	Sales forecast value in reporting currency	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Sales forecast - cum	Cumulative sales forecast quantity	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = not applicable Time dimension = not applicable
Marketing Forecast	Marketing forecast quantity	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Marketing Forecast - value (functional currency)	Marketing forecast value in functional currency	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Marketing Forecast - value (reporting currency)	Marketing forecast value in reporting currency	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Marketing forecast - cum	Cumulative marketing forecast quantity	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = not applicable Time dimension = not applicable

Measure	Description	Conforming Dimension	Aggregate Rules
Budget (functional currency)	Budget value in functional currency	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Budget (reporting currency)	Budget value in reporting currency	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Budget (functional currency) - Cum	Cumulative Budget value in functional currency	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Budget (reporting currency) - Cum	Cumulative Budget value in reporting currency	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Bookings forecast	Bookings forecast quantity	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Bookings forecast - value (functional currency)	Bookings forecast value in functional currency	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Bookings forecast - value (reporting currency)	Bookings forecast value in reporting currency	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimension	Aggregate Rules
Final forecast	Final forecast quantity	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Final forecast - value (functional currency)	Final forecast value in functional currency	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Final forecast - value (reporting currency)	Final forecast value in reporting currency	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Final forecast - cum	Cumulative final forecast quantity	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = not applicable Time dimension = not applicable
Bookings forecast - accuracy %	Booking forecast accuracy as a percentage	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Avg Time dimension = Avg
Bookings forecast - cum	Cumulative booking forecast quantity	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = not applicable Time dimension = not applicable
Shipment forecast	Shipment forecast quantity	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimension	Aggregate Rules
Shipment forecast - value (functional currency)	Shipment forecast value in functional currency	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Shipment forecast - value (reporting currency)	Shipment forecast value in reporting currency	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Shipment forecast accuracy %	Shipment forecast accuracy as a percentage	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Avg Time dimension = Avg
Shipment forecast - cum	Cumulative shipment forecast quantity	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = not applicable Time dimension = not applicable
Projected Backlog	Projected backlog quantity measured as difference between shipments and bookings forecasts	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Actual Backlog	Actual backlog quantity measured as difference between actual shipments and bookings	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Backlog	Sum of actual backlog and the projected backlog	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimension	Aggregate Rules
Production history	Actual Production history quantity	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Shipment history	Shipment history quantity	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Shipment history - value (functional currency)	Shipment history value in functional currency	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Shipment history - value (reporting currency)	Shipment history value in reporting currency	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Bookings history	Booking history quantity	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Attained Bookings %	Attained Bookings as a percentage of Consensus forecast	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Bookings history - value (functional currency)	Booking history value in functional currency	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimension	Aggregate Rules
Bookings history - value (reporting currency)	Booking history value in reporting currency	Organization, Item, Time, Priority, Customer, Demand class, Order Type	All dimensions except time = Sum Time dimension = Sum
Consensus Forecast accuracy - MAPE - 4 week	Consensus forecast accuracy measured as Mean Absolute Percentage Error (MAPE) over 4 weeks	Scenario, Plan Organization, Item, Time, Customer, Demand class	All dimensions except time = Avg Time dimension = Avg
Consensus Forecast accuracy - MAPE - 8 week	Consensus forecast accuracy measured as Mean Absolute Percentage Error (MAPE) over 8 weeks	Scenario, Plan Organization, Item, Time, Customer, Demand class	All dimensions except time = Avg Time dimension = Avg
Consensus Forecast accuracy - MAPE - 13 week	Consensus forecast accuracy measured as Mean Absolute Percentage Error (MAPE) over 13 weeks	Scenario, Plan Organization, Item, Time, Customer, Demand class	All dimensions except time = Avg Time dimension = Avg

The Network Design Functional Area

This table lists the primary measures of the Network Design functional area:

Measure	Description	Conforming Dimensions	Aggregate Rules
Net Demand	Net effective demand measured as maximum of actual sales order quantity or forecast quantity	Scenario, Plan Organization, Item, Time, Customer	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimensions	Aggregate Rules
Constrained Forecast	Constrained or satisfied forecast quantity	Scenario, Plan Organization, Item, Time, Customer	All dimensions except time = Sum Time dimension = Sum
Constrained Forecast - value (functional currency)	Constrained or satisfied forecast value in functional currency	Scenario, Plan Organization, Item, Time, Customer	All dimensions except time = Sum Time dimension = Sum
Constrained Forecast - value (reporting currency)	Constrained or satisfied forecast value in reporting currency	Scenario, Plan Organization, Item, Time, Customer	All dimensions except time = Sum Time dimension = Sum
Constrained Forecast - cum	Cumulative constrained or satisfied forecast quantity	Scenario, Plan Organization, Item, Time, Customer	All dimensions except time = not applicable Time dimension = not applicable
Constrained Forecast - Cum value (functional currency)	Cumulative Constrained or satisfied forecast value in functional currency	Scenario, Plan Organization, Item, Time, Customer	All dimensions except time = Cum Time dimension = Cum
Constrained Forecast - Cum value (reporting currency)	Cumulative Constrained or satisfied forecast value in reporting currency	Scenario, Plan Organization, Item, Time, Customer	All dimensions except time = Cum Time dimension = Cum
Budget Shortfall - functional currency	Shortfall from Budget based on constrained forecast	Scenario, Plan Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum

Measure	Description	Conforming Dimensions	Aggregate Rules
Budget Shortfall - reporting currency	Shortfall from Budget based on constrained forecast	Scenario, Plan Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Budget Shortfall %	Percent Shortfall from Budget based on constrained forecast	Scenario, Plan Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Inventory Build Target	Target Inventory quantity	Scenario, Plan Organization, Item, Time	All dimensions except time = Sum Time dimension = Last
Manufacturing forecast	Intermediate forecast demand including component demand and inter-organization transfer demand	Scenario, Plan Organization, Item, Time	All dimensions except time = Sum Time dimension = Sum
Fill rate	Fill rate of the end demands based on quantity satisfied on time	Scenario, Plan Organization, Item, Time	All dimensions except time = not applicable Time dimension = not applicable

Oracle Rapid Planning Measures

The following is the comprehensive list of measures that are required to support the Rapid Planning reports that are available in Oracle Advanced Planning Command Center:

Resource Facts

Facts	Description
Resource Requirement	Resource requirement in the supply chain

Resource Availability	Available resource capacity
Resource Utilization %	Utilization % of resources, that is, the ratio of resource requirement to resource availability
Supplier Capacity Utilization %	Ratio (percentage) of supplier capacity required to availability

Inventory Facts

Facts	Description
Projected Available Balance – Days of Cover	Projected inventory at the end a period represented in time units
Projected Available Balance - Quantity	Projected inventory at the end of a period represented in quantity units
On Hand	Quantity available at an Item/Location in the beginning of a period represented in quantity units
Total Supply	Total supply (scheduled receipts, on-hand) in the supply chain represented in quantity units
Planned Orders	
Projected Inventory Turns	Number of times inventory cycles in a year
Scheduled Receipts	Open Purchase Order or a Released Work Order with a receipt date and a quantity
WIP Start	Projected start date and quantity of a Work Order
Production to Plan	Difference between Planned WIP quantities and completed WIP quantities
Inventory Value	Projected available balance represented as a value
Safety Stock	Safety Stock Quantity

Safety Stock Violation Days	Number of days when inventory at end of a planning bucket was below minimum safety stock targets
Safety Out Days	Total number of days stocked out

Demand Facts

Facts	Description
Total Demand	Total demand (forecast, Sales orders and backlog) in the supply chain represented in quantity units
Projected Fill Rate	Demand Fill rate which is the percentage of demand that is satisfied
Forecast	Consumed forecast quantity in ASCP
Sales Orders	It is a confirmed order from the customer with a due date and is represented as an Order Type in the model.
Past Due Backlog Quantity	Difference between shipments and forecast in the past period
Shipments to Plan	Difference between Shipment History and Archived Consensus Forecast
Shipped Value	Shipment forecast quantity

Exception Facts

Facts	Description
Exceptions (Count)	Exceptions – Count (Stock Outs, Use Alternate Sources, Use Alternate Supplies)
Exception (Days)	Exceptions – Days (Late Sales Orders, Rescheduled Orders)

Exception (Value)	Exceptions – Value (Late Sales Orders)
Exceptions (Quantity)	Exceptions – Quantity (Late Forecast, Resource Overload)
Exceptions (Ratio)	Exceptions (Ratio) Exceptions – Ratio (Late Orders Ratio)

Revenue Facts

Facts	Description
Revenues (functional currency)	Revenues (in functional currency)
Gross Margin %	Gross margin (percentage)
Manufacturing cost (functional currency)	Manufacturing cost value in functional currency
Purchasing cost (functional currency)	Purchasing cost value in functional currency

Dashboards

Dashboards are designed for specific user roles. Each role has a predefined, customized dashboard that has the appropriate content and the appropriate dimension levels.

Each dashboard consists of related pages in a tab format. Each page corresponds to a single functional area such as inventory, manufacturing, sourcing, and so on. Each page has several reports. Each report reflects one or more measures with different dimensions that a user can analyze.

In addition to page level filters, some reports have report filters. Examples of report filters are: View, Measure, and so on.

Some reports provide a legend that displays the color used for the measure.

When placing your mouse pointer over a bar or line node, a tool tip appears with the value.

When using a left-mouse click on a linked value or measure, a menu displays all the secondary, drill-down reports that are available. Secondary, drill-down reports provide additional, detailed analysis for the selected measure.

Archiving Plans and Scenarios

The APCC analytical framework supports archiving planning scenarios and the plans.

A planning scenario is a collection of related plans that constitute a specific business condition.

Archiving scenarios archives all plans within the scenario. Archiving a plan is a snapshot of subset of the plan output that includes summary data, key performance metrics, and so on. Archiving a plan is not a snapshot of the entire plan output.

Each plan can be archived multiple times, resulting in multiple plan versions. A version is a snapshot of that plan at that point in time. It can be used later as a baseline for comparison to a later plan run. This comparison gives the planner an immediate feedback of the health of a plan over time.

Each version is labeled <plan name> - <archived date><sequence number>.

The label for the current version is <plan name> - Current.

The method in which a user invokes the archive option depends on whether it is for a composite scenario or for a specific plan. It also depends on the plan type.

Archiving a complete scenario, and all its associated plans, can be performed from the Scenario page. When a scenario is archived all plans that are associated to that scenario are also archived. This includes Demand Management, ASCP, and IO plans.

ASCP and IO plans can be individually archived from their respective applications. The plan launch program in the Planner workbench has an option called Archive current version of plan summary. The defaulted value of this option is No. If this option has a Yes value before launching the plan, then the system creates an archived version of the current plan output before it runs and generates the plan output. If this option has a No value before launching the plan, then the plan summary is always overwritten with the latest run and the results are always for the current version.

To bring your DRP plan into APCC, you need to manually run the Archive Plan Summary program. This concurrent program accepts the Plan, Keep archived version parameter. Valid values are Y or N. You can launch this program for DRP plans with the same version and archiving capability as plan types ASCP, SNO, IO, and SPP.

Note: There is no plan option that enables launch of archive plan summary after every plan run. You need to manually launch this program or schedule, if appropriate.

Once the archive plan summary is completed, you can access the following measures for this DRP plan in Oracle Business Intelligence – Enterprise Edition (OBI-EE).

For SNO facts the application has a publish option called Publish to Dashboard (APCC). This option publishes the SNO facts to the APCC repository and automatically creates an archived version of each published plan or scenario.

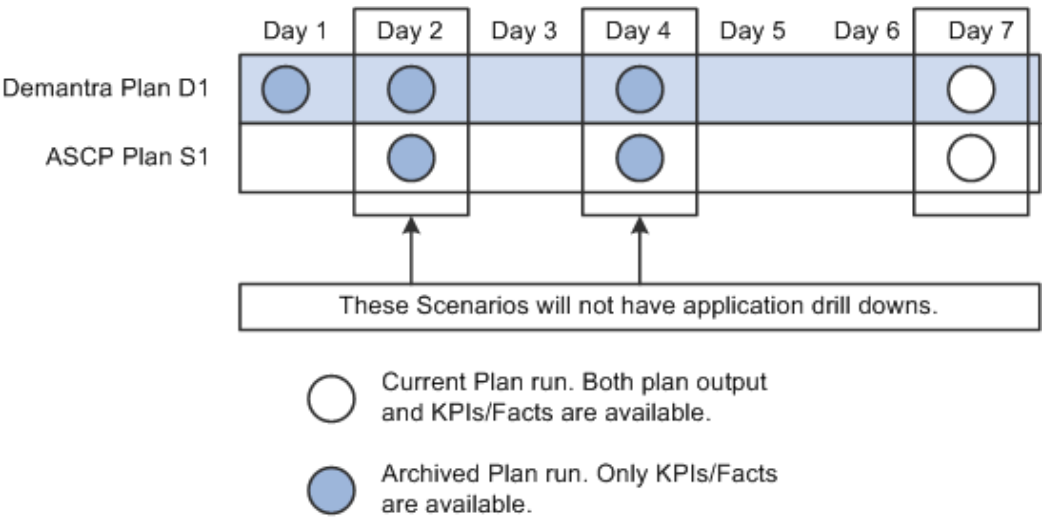
Archived plans are purged whenever the overall scenario is purged. Also, the Purge Plan process in ASCP and IO purges the plan and all of its archives, or versions, in the APCC repository.

For additional information of planning scenarios, see Understanding Scenario Planning, page 2-1.

Example – Trend Analysis

This example uses a scenario containing a Demantra forecast, or plan, which feeds an ASCP supply plan.

This diagram illustrates the Demantra Plan D1 and the ASCP Plan S1 being archived on multiple days, which enables a user to compare the versions of the plans:



The plans were archived on dates shown in the diagram. Therefore the archived versions that are available in the APCC repository are named:

Demantra Plan	Supply Plan
D1 (Day1)(1)	S1 (Day2)(1)
D1 (Day2)(2)	S1 (Day4)(2)
D1 (Day4)(3)	S1 (Day7)(3)
D1 (Day7)(4)	

These versions are available to the users in the dashboards. They are available for analysis on several what-if simulations depending on the assumptions that were made in each of the plan runs.

For example, the supply chain analyst can select the three S1 versions in the

Comparison Plans field, within the Supply Chain Analyst Dashboard, and any version as baseline in the Baseline Plan field. This enables the user to analyze the exceptions, inventory levels, and so on over the different plan runs.

Although there is no limit on the number of versions that a plan can have, it is expected that a periodic maintenance and a purge are performed to eliminate unnecessary volume in the repository tables. This provides maximum performance from the framework.

APCC Archive Plan Summary

You can increase the performance and speed for ASCP, RP, DRP, IO, and SPP plan archivals by fine tuning the amount of data that is processed in the Archive Plan Summary.

A simplified index results in a smaller fact table volume. The index is also disabled during archiving and rebuilt in a post archive step. Both these features reduce the amount of time it takes to archive your data.

During Plan Archival, the entire plan cannot be archived until several predecessor tasks complete. To make the process faster and improve throughput, these tasks process in parallel. As the diagram below illustrates, the process starts with archive demands. This is followed by archive demands_cum, which processes in parallel with archive item_orders. Summarize demands works in parallel with archive item_inventory, then summarize demands_cum works in parallel with summarize item_orders. The process ends with summarize item_inventory.



Fine Tuning Your Data for Archive Plan Summary

You have the option to perform any or all of the following options when you fine tune the Archive Plan Summary program:

- Archive at the manufacturing week or fiscal period level only
- Archive at the manufacturing week or fiscal period level only
- Select a subset of measure for archiving
- Start archive plan summary child requests as early as possible

Defining Your Data

You determine the amount of data that the Archive Plan Summary processes and can target only the data that you need to make available for APCC analysis. You determine this data by defining any or all of the following parameters:

- Time granularity
- Cumulative measures
- Other measures

Time Granularity

Time granularity improves overall performance by reducing the amount of data that is processed. There is no pre-summarization and, by default, the data is archived at the level of the reporting dates. You can archive by the manufacturing week or by fiscal period. The default is to archive by the manufacturing week.

When you select the Week level, the archival process supports roll up of data into months (in the fiscal period hierarchy) by breaking down the weeks into smaller reporting units wherever there are month boundaries. The month totals are still accurate and do not get skewed because of the time granularity selected during archival.

If you set this parameter to fiscal periods, you can further reduce the data volume, but you will not be able to view the data at more detailed levels.

Cumulative Measures

Calculating the cumulative measures takes a large proportion of the overall time in the archival process. By disabling some of these measures, that is, setting a subset of measures for archival, you can cut back on the time it takes to complete the calculations.

Other Measures

You can set the following measures to determine the amount of data you want to archive:

- Supplier Capacity Available and Utilization %
- Count of Sources and Single Items Sourced

Supplier data has four dimensions: Item, Organization, Supplier, and Date. The data for Supplier Capacity is duplicated for each organization to support the organization dimension. To eliminate the time required to process this duplication, the Supplier Capacity Available and Utilization % measure is disabled by default.

Item Attributes

There are 30 custom attributes available in Add Item Attributes. You can populate these

columns through customizations.

Setting Your Data for Archiving

A link under the Supply Chain Analyst responsibility, Advanced Planning Command Center Configuration, opens a page on which you can set time granularity, cumulative measures, and other measures.

Setting Time Granularity and Measures

To configure time granularity, cumulative measures, and other measures:

1. From the Oracle Applications Home Page Main Menu, click Advanced Planning Scenario Manager.
2. Click Others, and click Advanced Planning Command Center Configuration.

The Advanced Planning Command Center Configuration page opens.

The table below describes each field in the APCC Configuration page.

Field	Description	Value
Time level at which data is archived	Sets your time granularity	Valid values are: <ul style="list-style-type: none">• Manufacturing Week• Fiscal Period The default value is Manufacturing Week.
Currency Conversion Option	When you disable currency conversion, reporting currency value is copied from functional currency value.	Valid values are: <ul style="list-style-type: none">• Convert on Fact dates• Convert on Plan Start date• Do not convert The default value is Convert on Fact dates.

Cumulative Measures	Allows you to exclude these cumulative measures.	Select from the following: <ul style="list-style-type: none"> • Supplier Capacity Net Available – Cum • Net Resource Availability Cum • Constrained Forecast – Cum (quantity and value) and Budget Shortfall (value and percent)
Other Measures	Allows you to exclude these non-cumulative measures.	Select from the following: <ul style="list-style-type: none"> • Supplier Capacity Available and Utilization % • Count of Sources and Items Single Sourced <p>The default disables both options.</p>

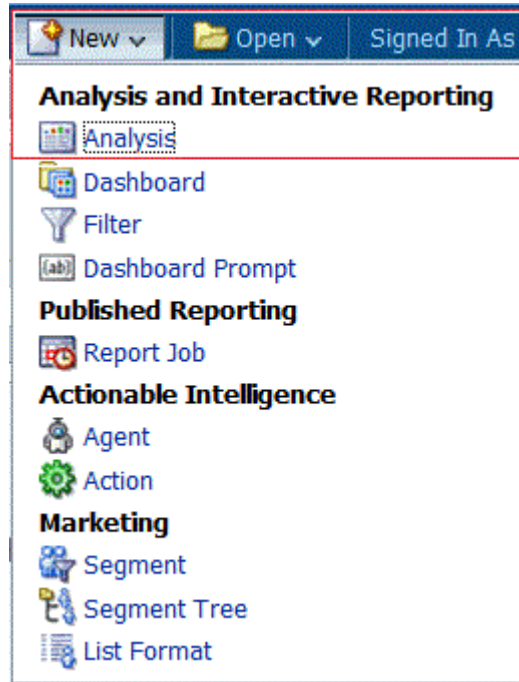
Accessing Item Attributes

You can access the additional item attributes through any of the APCC dashboards.

To access the item attributes, follow the steps below:

1. From the Oracle applications Home Page, Main Menu, click Supply Chain Analyst Standard, then click Dashboards, and then click Supply Chain Analyst Dashboard.

The Supply Chain Analyst Dashboard opens.



2. On the SCA dashboard menu bar, click New, and click Analysis.

The Subject Area window opens.

3. In the Subject Area window, select Advanced Planning.

4. In the Subject Areas menu, click Dimensions, and click Item.

A list opens showing all the item attributes that are available in Advanced Planning.

To populate these Item Attributes, you need to develop your own custom program; if you're not familiar with how to do this, contact your system administrator.

Setting up Profile Options

The analytical framework and the related dashboards use profiles. These profiles must be set up so that the repository has the right facts and dimensions.

This table lists the profile options and provides information about each option:

Profile Option Name	Level	Valid values	Default	Description
MSC: APCC Calendar Code	Site	All Calendar codes	None	The analytical layer and the dashboards that display the time hierarchy of manufacturing days, weeks, and periods use this. It is expected that this has the same value as the MSC: Bucketing Calendar profile that is used in the plan runs.
MSC:APCC Key Component Category Set	Site, responsibility, user level			The name of the category set that identifies the items, such as key component, and their categories that will have new dimensions of End Item and Parent Model enabled in the APCC repository.
MSC: APCC Period Set name	Site	All BIS (Business Intelligence System) Period set names	None	The analytical layer and the dashboards that display time in the hierarchy of days, fiscal periods, quarters, and year use this.

Profile Option Name	Level	Valid values	Default	Description
MSC: APCC Currency Code	Site	All currency codes	None	The analytical layer to convert the values in functional currency to a common reporting currency uses this. This profile is used as the reporting currency for APCC. Please note that if this profile is changed the plan must be republished to APCC repository to see the data in the new currency.

Profile Option Name	Level	Valid values	Default	Description
MSC: APCC Category Set 1, MSC: APCC Category Set 2, MSC: APCC Category Set 3	Site	All category sets	None	<p>These profiles govern which category set the analytical layer when displaying the item-category hierarchy uses. It precomputes the data for all three hierarchies, but displays the data using only the MSC: APCC Category Set 1 value.</p> <p>Therefore, if the user wants to view using the value in MSC: APCC Category Set 2, the values in these two profiles must be switched. The user can then see the results using the new category set, which is now in the MSC: APCC Category Set 1 profile. There is no need to rerun the plan or republish it to APCC</p> <p>However, if user decides to use a completely new category set, which is not currently in these three profiles, then the</p>

Profile Option Name	Level	Valid values	Default	Description
				profile values must be updated, and the plans must be rerun, or republished, to APCC for the change to take effect.
MSC: Enable Model & End Item Dimensions in APCC	Site, responsibility, or user level	Yes or No	No	Enables or disables the ETL processing required to populate the end item and parent model dimensions in the APCC. When set to 'Yes', the ETL is enabled. When set to 'No', the ETL is disabled.

Using the Supply Chain Analyst Dashboard

This chapter covers the following topics:

- Understanding the Supply Chain Analyst Dashboard
- Using the Plan Health Summary Page
- Using the Demand and Supply Page
- Understanding the Editable Material Plan
- Navigating to the Editable Material Plan
- Rapid Planning Supply Demand Plan Drilldowns
- Excess and Obsolescence
- Using the Resources Page
- Using the Exceptions Page
- Using the Historical Performance Page
- Using the Scenario Analysis Page
- Using the Inventory Analysis Page
- Supply Chain Analyst Secondary Drill-Down Reports

Understanding the Supply Chain Analyst Dashboard

The Supply Chain Analyst role has access to a predefined dashboard with a selection of different seeded reports. These reports enable the supply chain analyst to perform tasks related to supply chain analysis. The report pages leverage the flexibility of the Oracle Business Intelligence – Enterprise Edition (OBI-EE), which enables the layout and content of the delivered reports to be changed by the user

The reports are organized in logical groupings as pages, or tabs, within the Supply Chain Analyst Dashboard.

For details on how to use the OBI-EE features, see Oracle Business Intelligence

Answers, Delivers, and Interactive Dashboards User Guide.

These pages are available for the supply chain analyst:

- Plan Health Summary
- Demand and Supply
- Resources
- Exceptions.
- Historical Performance
- Scenario Analysis
- Glossary

The Glossary page provides:

- Definitions of all measures that are presented in the Supply Chain Analyst Dashboard.
- Information about the logic used to calculate each measure.

Integration of Oracle Advanced Planning Command Center and Oracle Inventory Optimization

Oracle Inventory Optimization (IO) integrates with Oracle Advanced Planning Command Center (APCC) for accounting for cycle inventory in safety stock calculation and warehouse capacity constraints. Several measures and seeded reports in APCC support:

- Warehouse Capacity Constraints
- Accounting for Cycle Inventory in Safety Stock Calculation

Managing Inventory Optimization Plans from Advanced Planning Command Center

The integration between Oracle Inventory Optimization and Oracle Advanced Planning Command Center lets you define multiple IO plans, modify their inputs, compare plans, launch plans, and evaluate their results, from within APCC. You can do this on two levels:

- Quick simulations in which you can change a constraint at the plan level and launch your plans
- Detailed simulations in which you can copy your base plan, modify several different inputs at various levels, and launch any or all of your plans

You can work with your IO plans from the Inventory Analysis page of the Supply Chain Analyst dashboard and the SLA Analysis page of the Service Supply Chain Analyst dashboard.

In APCC you can:

- Run a Quick Simulation by modifying a constraint on the base plan at the plan level
- Copy plans and edit their inputs
- Create a new Service Level Set or Item Simulation Set
- Launch multiple plan runs
- Review and compare plan results

While reviewing the plan results, you can look at your plan inputs. For example, while reviewing the recommended safety stock values, you may want to review the lead time variables. To support this analysis, the system archives measures related to inventory planning, makes them available in APCC when it archives the base IO plans, and archives them in APCC when you set up and launch a plan in APCC.

You can see these inventory planning measures associated with each plan:

- Total Demand
- Forecast
- Total Supply
- Planned Orders
- Mean Absolute Deviation
- Minimum Inventory Level
- Maximum Inventory Level
- User Specified Safety Stock
- Demand Fulfillment Lead Time
- Supplier Lead Time Variability (%)
- Manufacturing Lead Time Variability (%)
- Intransit Lead Time Variability (%)
- Required Warehouse Capacity

- Inventory Budget

For more information about the integration of IO and APCC, refer to the When a DRP plan is launched, users will have the option to keep the previous version of the plan archive around (for comparison purposes) or overwrite the previous version with the current version. This is done using the new plan launch parameter "Archive Current Version of Plan Summary" similar to ASCP Plans. (Default value for this parameter is No).

The APCC measures and their conforming dimensions and aggregation rules are shown in the following tables:

Measures	Meaning	Conforming Dimensions														Aggregation Rules	
		Scenario	Plan	Organization	Item	Resource	Time	Priority	Supplier	Source	Ship Methods	Demand Class	Order Type	Exception Type	Project	All Dims Except Time	Time Dim
Total Demand	Sum of all Demands Qty	X	X	X	X		X									Sum	Sum
Forecast	Forecast Quantity	X	X	X	X		X	X				X	X			Sum	Sum
Total Supply	Sum of all Supplies Qty	X	X	X	X		X									Sum	Sum
Planned Orders	Planned Orders in IO plan	X	X	X	X		X						X			Sum	Sum
Mean Absolute Percent Error	Mean Absolute Percent Error	X	X	X	X		X					X				avg	avg
Mean Absolute Deviation	Mean Absolute Deviation	X	X	X	X		X					X				avg	avg
Minimum Inventory Level	Minimum Inventory Level	X	X	X	X		X									Sum	Last
Maximum Inventory Level	Maximum Inventory Level	X	X	X	X		X									Sum	Last

		Conforming Dimensions													Aggregation Rules		
Measures	Meaning	Scenario	Plan	Organization	Item	Resource	Time	Priority	Supplier	Source	Ship Methods	Demand Class	Order Type	Exception Type	Project	All Dims Except Time	Time Dim
User Specified Safety Stock	Mean Absolute Deviation	X	X	X	X		X						X			Sum	Sum
Demand Fulfillment Lead Time	Agreed fulfillment lead time for the item-org-customer	X	X	X	X							X				avg	-
Supplier Lead Time Variability (%)	Variability in supplier Lead Time	X	X	X	X				X							avg	-
Manufacturer Lead Time Variability (%)	Variability in manufacturing Lead Time	X	X	X	X											avg	-
Intransit Lead Time Variability (%)	Variability in Intransit Lead Time	X	X	X	X											avg	-
Required Warehouse Capacity	Required Warehouse Capacity (for all item/locations in the plan, not just those that have a storage capacity associated with them.	X	X	X			X									Sum	Sum
Inventory Budget	Inventory Budget used in IO plan	X	X	X	X												

Pushing Warehouse Capacity Facts and Dimensions to APCC

The Archive Plan Summary concurrent program has facts and dimensions that support pushing warehouse capacity to APCC. The facts and dimensions are:

Facts:

- Available Capacity
- Required Capacity
- Average Cycle Stock
- Average Cycle Stock - Volume
- Inventory Quantity Increment
- Inventory Quantity Increment - Volume
- Average Daily Demand
- Average Daily Demand - Volume
- Projected Available Balance - Volume

- Safety Stock - Volume

Dimensions

- Organization
- Category
- Item
- Time
- Plan

Note: The facts are pushed to APCC regardless of existence of any Warehouse Capacity Exceeded Exception.

Understanding the Seeded Reports

Five Inventory Optimization seeded reports are available on the Inventory Planning tab in APCC. The five reports are:

- Warehouse Capacity Report – Capacity at Storage Type Level
- Warehouse Capacity Report – Item Level / Capacity at Storage Type Level
- Cycle Stock Report
- Warehouse Capacity Report – Capacity at Organization Level
- Warehouse Capacity Report – Item Level / Capacity at Organization Level

Warehouse Capacity Report - Capacity at Storage Type Level is the default report.

Integration of Oracle Advanced Planning Command Center and Oracle Rapid Planning

APCC supports Rapid Planning reports in the same manner that it supports drilldown to the ASCP workbench. Listed below are the Supply Chain Analyst Dashboard pages that you can use to view Oracle Rapid Planning information:

- Plan Healthy Summary, includes a report to highlight cost parameters (revenue, manufacturing cost, purchasing cost, transportation cost, carrying cost, total cost and gross margin)
- Demand and Supply
- Resource

- Exceptions, includes Oracle Rapid Planning exception messages and a report to compare orders via a drilldown
- Historical Performance
- Scenario Analysis, includes a report to highlight cost parameters (revenue, manufacturing cost, purchasing cost, transportation cost, carrying cost, total cost and gross margin)

Drilldowns from APCC to Rapid Planning are available from Item, Organization or Resource column only.

When you are accessing the Rapid Planning reports as a drill down from APCC, the Plan being passed must either be loaded or loaded into memory and the relevant report in Rapid Planning displayed with the passed context. The data from the last saved report is displayed. This may be different from what is displayed in APCC if the archive workflow was not run after the changes were made in Rapid Planning.

Note: If there is an instance of Rapid Planning already open by the user, then it will be refreshed when opening a drill down report from APCC. It will not be opened in a new browser. If, on the other hand, there is no instance of Rapid Planning already open the Rapid Planning report is displayed in a new browser.

Using the Plan Health Summary Page

This section provides an overview of the Plan Health Summary page and discusses:

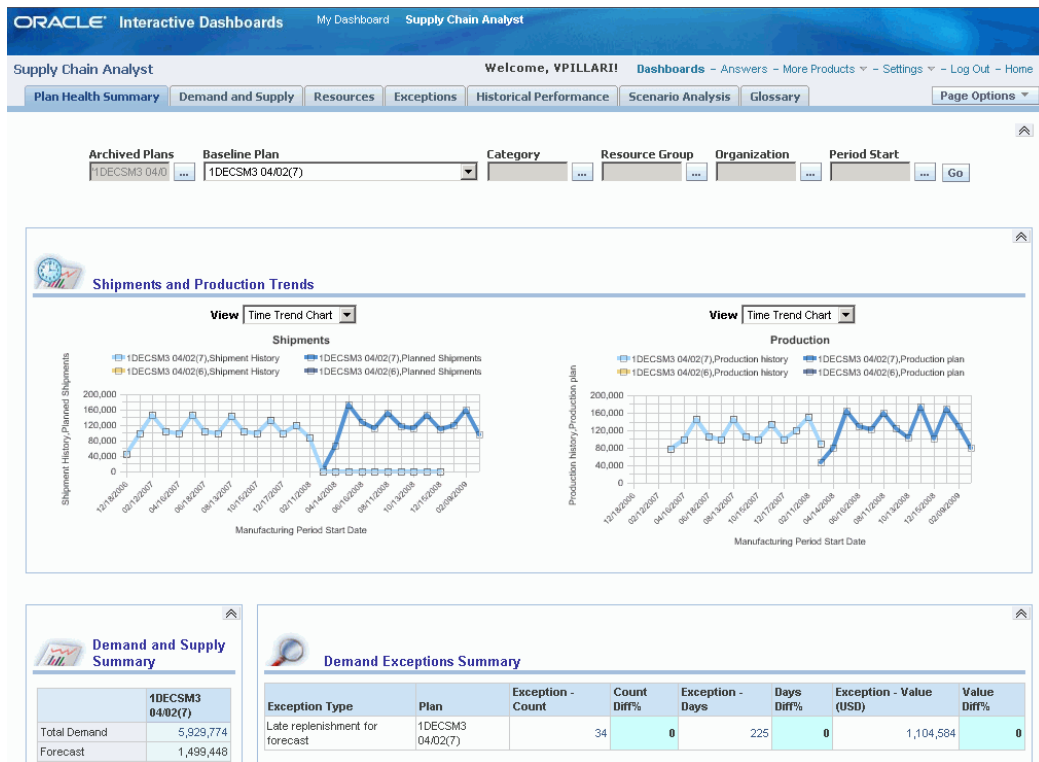
- Page-Level filters
- Shipments and Production Trends
- Demand and Supply Summary
- Resource Summary
- Exception Summary

Understanding the Plan Health Summary Page

The Plan Health Summary page provides a high-level summary of the health of the supply chain plan. It displays primary measures for supply and demand, resources, and exceptions. It also enables the supply chain analyst to compare an archived version of a plan against a current version, or compare two or more plans.

To access the Plan Health Summary page:

1. Select the Supply Chain Analyst responsibility.
2. Select Supply Chain Analyst Dashboard.



Page-Level Filters

Page-level filters are provided at the top of the Plan Health Summary page. Page-Level filters are used to filter the results of the work areas.

This table lists the page-level filters for the Plan Health Summary page:

Filter	Description
Archived Plans	Select from a list of plans from which an archived plan can be selected. Multiple plans can be selected. This is a required field.
Baseline Plan	Select from a list of plans that are to be used as the baseline. Only one plan can be selected. This is a required field.

Filter	Description
Category	Select from a list of categories. Multiple categories can be selected. This is an optional field.
Resource Group	Select from a list of resource groups. Multiple resource groups can be selected. This is an optional field.
Organization	Select from a list of organizations. Multiple organizations can be selected. This is an optional field.
Period Start	Select from a list of date and time selections. A range of date and time can be selected. This is an optional field.

Shipments and Production Trends

The Shipment and Production Trends report enables the user to evaluate:

- How the key supply chain metrics of the plan and actuals compare to past periods?
- What plan trends are projected to be in the future

To view an example of the Shipments and Production Trends report, see [Understanding the Plan Health Summary Page](#), page 5-7

In addition to the page-level filters at the top of the page, users can specify this filter for the report:

Field	Description
View	<p>Select how you want to view the report. Options include Time Trend Chart and Time Trend Table.</p> <p>The Time Trend Chart view plots the shipment history and planned shipments over time using a line graph. The Time Trend Table view provides the values that correspond to the Time Trend Chart view.</p>

Additional reports that you can be access from the Shipment and Production Trends

report are (listed in alphabetical order):

- Days of Cover by Items.
- Days of Cover by Organizations.
- Exception Summary.
- Total Demand by Customers.
- Total Supply by Categories.
- Work In Progress (WIP) Start by Organizations.

Demand and Supply Summary

The Demand and Supply Summary report enables the user to determine how demand and supply differ between a baseline plan and archived plans.

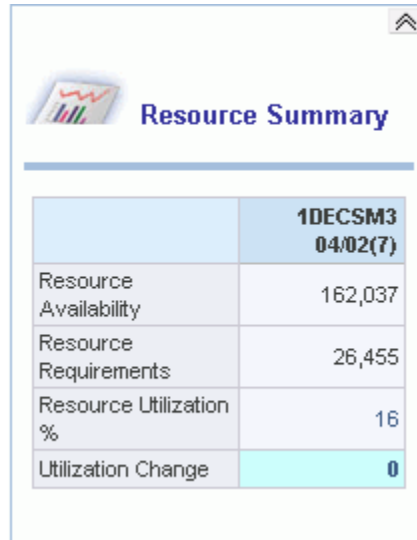
The screenshot shows a web-based report titled "Demand and Supply Summary". At the top left is a small icon of a bar chart with a red line. The title is in blue text. Below the title is a table with two columns. The first column lists various metrics, and the second column shows their values for a specific period. The period is indicated as "1DECSM3 04/02(7)". The metrics include Total Demand, Forecast, Sales Orders, Total Supply, On Hand, Scheduled Receipts, Planned Orders, PAB - Days of cover, Projected Fill rate, Projected Inventory turns, Total Demand Difference, and Total Supply Difference. The last two rows show 0% difference. The Projected Fill rate and Projected Inventory turns have small green progress bars next to their values.

	1DECSM3 04/02(7)
Total Demand	5,929,774
Forecast	1,499,448
Sales Orders	
Total Supply	5,960,222
On Hand	66,666
Scheduled Receipts	86,689
Planned Orders	5,806,867
PAB - Days of cover	2
Projected Fill rate	99 
Projected Inventory turns	71 
Total Demand Difference	0%
Total Supply Difference	0%

For a list of the additional reports that you can access from the Demand and Supply Summary report, see Demand and Supply Summary, page 5-30

Resource Summary

The Resource Summary report enables the user to determine how resource utilization varies between baseline and archived plans.

A screenshot of the 'Resource Summary' report interface. It features a title bar with a small icon and the text 'Resource Summary'. Below the title bar is a table with two columns. The first column lists resource metrics, and the second column shows their values for a specific plan. The table data is as follows:

	1DECSM3 04/02(7)
Resource Availability	162,037
Resource Requirements	26,455
Resource Utilization %	16
Utilization Change	0

Additional reports that you can access from the Resource Summary report are (listed in alphabetical order):

- Exception Summary.
- Least Utilized Resources.
- Most Utilized Resources.
- Resource Utilization by Resource Groups.
- Resource Utilization by Organizations.

Exception Summary Report

The Exception Summary report enables the user to:

- View a summary of exceptions in the baseline plan.
- Compare exceptions between baseline and archived plans.

The Exceptions Summary report is detailed into six subreports:

- Item Exceptions Summary
- Resource Exceptions Summary

- Demand Exceptions Summary
- Inventory Exceptions Summary
- Alternate Exceptions Summary.
- Reschedule Exceptions Summary

Item Exception Summary Report

The Item Exception report is a new report that enables users to analyze an exception severity based on a specified measure aggregated by specific seeded dimensions such as Organization, Category, and Organization-Category in the Baseline plan. You can use the page level filters to create this report for specific organizations, categories, and periods and view the results as a bar graph or table.

The Item Exception report provides the following facts:

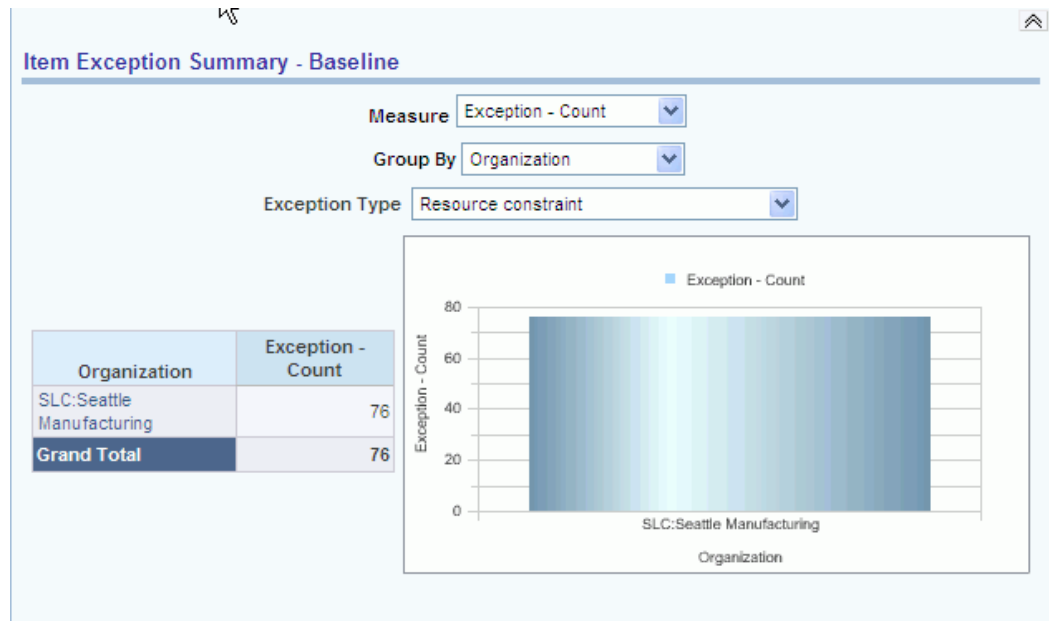
- Exception Count
- Exception Days
- Exception Value
- Exception Quantity
- Exception Ratio

You can group your results by:

- Organization
- Category
- Item
- Org/Category
- Category/Item
- Customer
- Supplier
- Customer/Item
- Supplier/Item
- Demand Class

- Project

Below is an example of an Item Exception Summary Report



By double clicking on an entity cell, you can drill down to the underlying applications. The contexts that are passed down are the plan and the entities associated with each cell. In the resulting window, all items with the Items with a Shortage exception in the organization and category are displayed. Drilldown to applications is not supported from this report. However, drilldown along the dimensional model is supported, for example, Category to Item.

The drilldown from this report is available for all values specified in the Group By field.

Note: The Resource value in the Group By field is disabled for DRP and CP plans. You can drill down to Service Parts Planning (SPP) only if the report is grouped by Item, Category / Item, Customer / Item, or Supplier / Item. This report may be displayed with the following Plans ASCP, DRP, SPP, SNO and CP.

The formatting of the Exception columns is based on the selected measure:

- Exception Count – Integer
- Exception Quantity – Integer
- Exception Value – Integer with \$ sign
- Exception Days – Number with one decimal

- Exception Ratio - Number with two decimals
- Use a comma (",") for 1000 separator

Resource Exceptions Summary Report

The Resource Exception Summary report enables users to analyze a Resource related exception severity based on a specified measure aggregated by specific seeded dimensions such as Organization, Category, and Org / Category in the Baseline plan. User can also use the page level filters to create this report for specific organizations, categories, and periods.

You view this report by plan in table or bar graph format. If you view the report in table format, you can filter your results in two more parameters in addition to the page level filters:

- Exception Type is the ability to select an exception type using the combo box containing the list of exception types. Note that only Resource related exceptions are available in this selection.
- Measure is the ability to select one of the exceptions facts as the measure to be displayed in the table. The measures include: Exception Count, Exception Value, Exception Days, Exception Quantity, and Exception Ratio.

The Resource Exception Summary report provides the following facts:

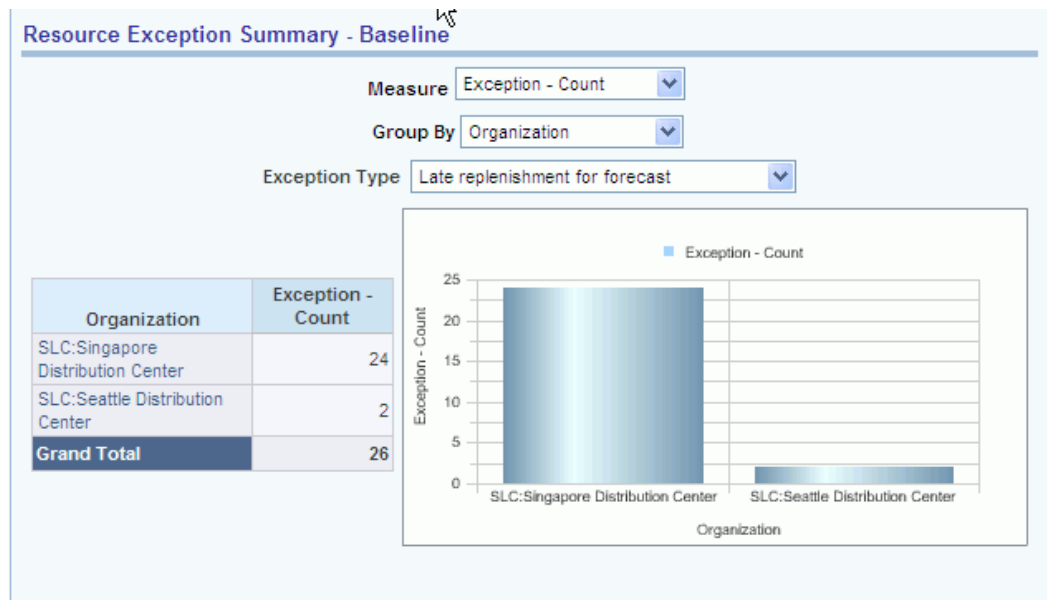
- Exception Count
- Exception Days
- Exception Value
- Exception Quantity
- Exception Ratio

You can group your results by:

- Organization
- Category
- Item
- Org/Category
- Category/Item
- Customer

- Supplier
- Customer/Item
- Supplier/Item
- Demand Class
- Project

Below is an example of a Resource Exception Summary report:



Drill downs to applications is not supported from this report. However, drilldown along the dimensional model is supported, for example, Category to Item.

Note: The Resource value in the Group By field is disabled for DRP and CP plans.

Note: You can drill down to Service Parts Planning (SPP) only if the report is grouped by Item, Category / Item, Customer / Item, or Supplier / Item. This report can be displayed with the following Plans ASCP, DRP, SPP, SNO and CP.


The following windows of the underlying applications are displayed as a result of drilling down from the above report:



- ASCP – Exception Details window, all detail level exceptions for the selected entities are displayed.



- DRP – Exception Details window, all detail level exceptions for the selected entities are displayed.
- SPP – Exception Details, all detail level exception for the selected entities are displayed.
- SNO – Alerts, only the plan context is passed down.
- CP – Exception Details window, all detail level exceptions for the selected entities are displayed.

The formatting of the Exception columns is based on the selected measure:

- Exception Count
- Integer Exception Quantity
- Integer Exception Value
- Integer with \$ sign Exception Days
- Number with one decimal Exception Ratio - Number with two decimals
- Use comma (",") for 1000 separator.

 Demand Exceptions Summary							
Exception Type	Plan	Exception - Count	Count Diff%	Exception - Days	Days Diff%	Exception - Value (USD)	Value Diff%
Late replenishment for forecast	1DECSM3 04/02(7)	34	0	225	0	1,104,584	0

 Inventory Exceptions Summary				 Alternate Exceptions Summary			
Exception Type	Plan	Exception - Count	Count Diff%	Exception Type	Plan	Exception - Count	Count Diff%
Items below safety stock	1DECSM3 04/02(7)	222	0	Order sourced from alternate facility	1DECSM3 04/02(7)	23	0
Items with a shortage	1DECSM3 04/02(7)	2,641	0	Order sourced from alternate supplier	1DECSM3 04/02(7)	31	0

 Reschedule Exceptions Summary						 Resource Exceptions Summary			
Exception Type	Plan	Exception - Count	Count Diff%	Exception - Days	Days Diff%	Exception Type	Plan	Exception - Ratio	Ratio Diff%
Orders to be rescheduled in	1DECSM3 04/02(7)	1	0	2	0	Resource overloaded	1DECSM3 04/02(7)	25000310	0
Orders to be rescheduled out	1DECSM3 04/02(7)	6	0	155	0	Resource underloaded	1DECSM3 04/02(7)	26	0

Additional reports that can be accessed from the Exception Summary report are (listed in alphabetical order):

- Days of Cover by Items.
- Exceptions Trend Over Time.
- Exceptions Type by Category.
- Exceptions Type by Customer.
- Exceptions Type by Items.
- Exceptions Type by Organization.
- Exceptions Type by Supplier.
- Least Utilized Resources.
- Most Utilized Resources.
- Resource Utilization by Organization.

Launching a Plan From Within APCC

You can launch your plan and analyze the impact of your changes on your plan directly in APCC. In some cases, you may want to run the plan without taking a new snapshot to see the impact of your edits. In other cases, you may want to take a new snapshot and run the plan.

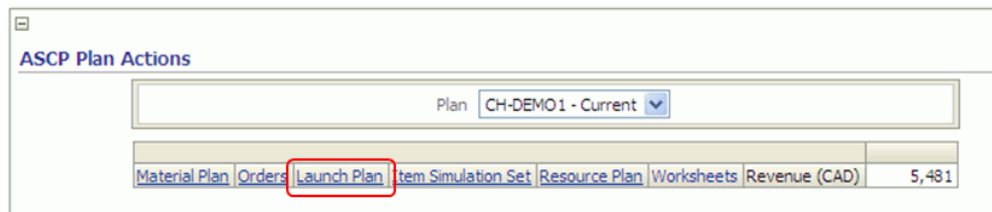
When you take a new snapshot, any previous edits from the material plan, resource plan, or orders user interface (UI) are overlaid. Edits to the item simulation set remain unchanged since the simulation set is re-applied after the snapshot is taken.

Use the checkbox in the ASCP Launch Plan parameters to accommodate both scenarios. When you select the Launch Plan link, the system displays the Launch Plan dialog and allows you to select the appropriate options and then run the plan.

Launching the Plan

To launch your plan, follow the steps below:

1. Click the Plan Health Summary tab or the Demand and Supply tab of the APCC dashboard.
2. From the ASCP Plan Actions box on your screen, select Launch Plan, as shown below.



3. Scroll down and select the baseline or comparison plans you wish to carry as context into the ASCP Plan Actions.

Note: Archived plans are not available for selection.

4. If you wish to perform a batch re-plan, which will factor in all the edits you have made, check the Net Change Simulation checkbox, as shown below.

Note: If you select the Net Change Simulation checkbox, all other parameters are disabled.

If you do not select to perform a net change simulation, then the Launch Plan dialog functions are identical to those in the current ASCP Launch Plan dialog. That is, the options available and the output are identical to those of ASCP.

After you press OK, a dialog appears showing the plan name and request ID. For more information on the Launch Plan options available and the output in ASCP, refer to the *Oracle Advanced Supply Chain Planning Implementation and User's Guide*.

5. When the launch plan is finished running, press Go button on the dashboard to refresh the page and see the changes.

Note: Because the Launch Snapshot parameter works like the ASCP Launch Plan Snapshot parameter, any edits to material plan, resource plan, or orders are overlaid with the new snapshot. The edits to the item simulation set remain unchanged and are reapplied after the new snapshot is taken.

When you select either Launch Plan or Launch Net Change Simulation from the ASCP Plan Actions box, the selected plan is passed in as context and the applicable launch plan dialog appears.

Releasing a Plan From Within APCC

To release your plan in APCC, follow the steps below:

1. Navigate to the Orders UI using one of the options described in the section *Navigating to the Orders User Interface* in this document.

- From the Actions drop-down menu, select Mark for Release.

As soon as your orders are marked for release, you can edit the Implement fields, as shown below.

- Edit the Implement fields, as required.

Description	Firm Status	Order Type	Order Number	Suggested Due Date	Qty/Rate	Marked For Release	Action	Implement Date	Implement Qty/Rate	Implement As	Source
Purchased Compo...	Not Firm	Purchase order	5892(1)(1)(1)	Jan 6, 2016	1	<input checked="" type="checkbox"/>	None	Jan 6, 2016	1	None	
Purchased Compo...	Not Firm	Purchase order	5892(1)(2)(1)	Jan 6, 2016	2	<input checked="" type="checkbox"/>	None	Jan 6, 2016	2	None	
Purchased Compo...	Not Firm	Purchase order	5892(1)(4)(1)	Jan 6, 2016	4	<input checked="" type="checkbox"/>	None	Jan 6, 2016	4	None	
Purchased Compo...	Not Firm	Purchase order	5892(1)(3)(1)	Jan 13, 2016	3	<input checked="" type="checkbox"/>	None	Jan 13, 2016	3	None	

- From the Actions drop-down menu, select Release Plan.

The Release Plan dialog appears once the release is complete.

CMRO Loaded Jobs	CMRO Loaded Jobs Request Id	New Work Orders	PO Reschedule Request Id	Rescheduled POs	OSFM Request Id	Reschedule Orders
0		0	40583835	1		0

Saving Your Changes

As you make your edits, the system updates the firm date, firm quantity and firm status of the edited planned orders, as well as forecast records, or manual demands that make up the bucketed number. These changes are not committed to the database until you choose to save and close the dialog. If there are unsaved changes when you try to close the dialog, you will be asked whether or not you want to save your changes.

Understanding the Orders User Interface Features

The orders are filtered based on the context that was passed in or by the search criteria you enter. You can also edit selected columns from a drop-down menu or by entering a specific value.

Order UI features are listed below:

- You can edit firm status, new date, new quantity, and order priority.
- The plan that you pass in as context displays in the Title of the dialog.
- If you pass in context, other than plan, the search criteria section collapses.
- If you pass only the plan, the search criteria expands. In this case, you need to press the Search button before any orders will appear in the table.
- At least one of the available search fields must have a value specified.

Orders: CH-DEMO1

Search

Match: ☒ All ☐ Any

Organization: Equals [] Supplier: Equals []

Category: Equals [] Customer: Equals []

Item: Equals [] Suggested Due Date: Equals []

Order Type: Equals [] Planned order Material Available Date: Equals []

Search Reset Save... Add Fields

Organization	Item	Description	Firm Status	Order Type	Order Number	Suggested Due Date	Qty/Rate	Marked For Release	Action	Implement Date	Implement Qty/Rate	Implement As	Source
SLC:M1	CH-1000	Final Assembly ite...	Not Firm	Planned order	25030336	Feb 12, 2016	5	<input type="checkbox"/>	Release				SLC:M1
SLC:M1	CH-1000	Final Assembly ite...	Not Firm	Planned order	25030337	Feb 12, 2016	8	<input type="checkbox"/>	Release				SLC:M1
SLC:M1	CH-1000	Final Assembly ite...	Not Firm	Planned order	25030338	Feb 12, 2016	4	<input type="checkbox"/>	Release				SLC:M1
SLC:M1	CH-1000	Final Assembly ite...	Not Firm	Planned order	25030339	Feb 12, 2016	3	<input type="checkbox"/>	Release				SLC:M1

Save Save and Close Cancel

Understanding the Search Fields

The search options are listed in the table below.

Fields	Comment
Organization,	Optional. Multi-Select. Valid values are: <ul style="list-style-type: none"> Equal To Starts With Contains
Category	
Item	
Order Type	
Customer	
Source Supplier	

Suggested Due Date	Optional. Single value for all operators, except the Between operator, which requires two values. Valid values are:
Material Available Date	
	<ul style="list-style-type: none"> • Equal To • Between • Greater Than • Less Than

Understanding the Table Columns

The table columns provide several areas of information. Below is the complete list of available columns and whether you can edit their values. To access all the available columns of information, use the horizontal scroll bar at the bottom of your screen.

Column	Editable (Yes/No)	Comments
--------	-------------------	----------

Organization	No	No Comments
Item		
Description		
Order Type		
Order Number		
Sugg Due Date		
Qty/Rate		
Action		
Source Org		
Source Supplier		
Source Supplier Site		
Customer		
Priority		
Customer Site		
Material Available Date		
Sugg Dock Date		
Need by Date		
Sugg Start Date		
Sugg Ship Date		
Sugg Order Date		
Marked for Release	Checked when the Mark for Release action is taken from the action menu.	No Comments
Firm Status	Yes	No Comments
Implement Date		
Implement Qty/Rate		
Implement As		
Firm Date		
Firm Quantity		

Order Value	No	Order Value differs based on order type. Sales Order = Order Qty * Unit Price (on the order) Purchase Order = Order Qty * Unit Price (on the order) Forecast = Dmd Qty * List Price (from Item attributes) Planned Order = Order Qty * Item Standard Cost
-------------	----	---

The following table illustrates which fields are editable, based on the order type, as well as which order types are eligible for release:

Editable Fields	Editable Order Type (EOT) Purchase Order	EOT Purchase Requisition	EOT Work Order	EOT Planned Order	EOTForecast	EOT Sales Order	EOT manual Demand	Comments
New Date	x	x	x	x	x	x	x	
New Quantity	x	x	x	x	x	x	x	For Purchase Orders, Work Orders cannot be set to a non-zero quantity.
Order Priority					x	x	x	

Implement Date	x	x	x	x		
Implement Rate Qty	x	x	x	x		For Purchase Orders, Work Orders cannot be set to a non-zero quantity.
Release Status by means of Action	x	x	x	x	x	For sales orders, only orders with recommended changes are release.

Understanding the Table Toolbar

The toolbar across the top of your plan provides various options with which to customize your display. These options are explained below.

Action

The Action drop-down menu has three options:

- Mark for Release: Applies to selected rows. Updates the release status of all selected rows to Marked for Release and updates the set of implement fields using the same logic as ASCP. Once orders are Marked for Release in the Action menu, you can edit the implementation fields
- Release Plan: Applies to entire plan. Releases the Plan and displays the Release Plan Dialog

Note: Release Plan applies to the entire, including elements not

currently shown in the table.

- Export to Excel: Exports all the data in the table to a Microsoft Excel spreadsheet.

View

The View drop-down menu has four options:

- Columns: Displays the available columns and allows the user to choose which columns to display, the order in which they appear and the sort sequence. Your changes persist across sessions as a user profile until you change them. The layout configuration is saved automatically.
- Reorder Columns: Displays the visible columns and allows you to reorder the columns.
- Sort: Allows you to sort the active column in ascending or descending, or to perform an advanced sort using up to three columns.
- Detach: Detaches the table to allow you to expand it.

Passing into Context

The context is passed in from either a query or from the Editable Material Plan into this UI. You can pass into context by drilling from the editable Material Plan or directly from ASCP Plan Actions, as described earlier in this document in the section *Navigating to the Orders User Interface*.

You can pass any combination of the following values into context:

- Organization (single or multiple values)
- Product Category (single or multiple values)
- Planner (single value)
- Supplier (single or multiple values)
- Order Number (single or multiple values)
- A range of due dates (begin and end date)

Note: While navigation is generally passing single values by clicking on a single product category and navigating to the editable material plan, the editable material plan is also called from ASCP personal queries, which can pass multiple product categories into the editable material plan.

You can override the context that was passed in by entering search criteria and pressing the Search button. The original context is discarded and the table is filtered using your search criteria.

Using the Orders User Interface

The orders user interface (UI) streamlines the business process by providing direct access to your orders from within APCC. You can search over a set of orders, mark orders for release as well as edit form order status or change their priority.

Navigating to the Orders User Interface

From within APCC, you navigate to the Orders UI using one of the following options:

- Option 1: Drill from the editable Material Plan.
- Option 2: Access directly from the ASCP Plan Actions window.

Option 1: Drilling from the Editable Material Plan to the Orders UI

1. From the Supply Chain Analyst Dashboard, open the editable Material Plan, using any of the options described in the section. *Navigating to the Editable Material Plan* in this document.
2. Select one or more cells in the plan and right click to view the orders related to the selected cells. For example, if you select planned orders for items CM66323 and CM66324 for the weeks of 3-Oct and 10-Oct, the system displays the planned orders that make up the four selected cells.

Material Plan: 1Daily 06/23(16)

Action ▼View ▼

Setup *Layout Supply and Demand Organization Seattle *Category Set ASCP Category Electrical Components Recalculate

			3-Oct-12								
			3-Oct-12	10-Oct-12	17-Oct-12	24-Oct-12	31-Oct-12	7-Nov-12	14-Nov-12	21-Nov-12	
Total		Planned orders	10,000	20,000	25,000	22,000	28,000	30,000	35,000	35,000	
		Current scheduled receipts	20,000	10,000	8,000	5,000	3,000	1,000	0	0	
		Total supply	30,000	30,000	33,000	27,000	31,000	31,000	35,000	35,000	
		Gross requirements	25,500	30,000	31,000	27,000	30,000	35,000	30,000	30,000	
		Projected available balance	4,500	4,500	6,500	6,500	6,500	2,500	7,500	7,500	
Seattle	Electrical Components	CM66323	Planned orders	1,000	2,000	1,000	1,500	2,000	2,500	3,000	3,000
			Current scheduled receipts	2,000	1,000	1,000	1,000	500	0	0	0
			Total supply	3,000	3,000	2,000	2,500	2,500	2,500	3,000	3,000
			Gross requirements	2,500	2,500	2,200	2,200	2,500	2,800	3,500	3,500
		CM66324	Planned orders	1,000	2,000	1,000	1,500	2,000	2,500	3,000	3,000
			Current scheduled receipts	2,000	1,000	1,000	1,000	500	0	0	0
			Total supply	3,000	3,000	2,000	2,500	2,500	2,500	3,000	3,000
			Gross requirements	2,500	2,500	2,200	2,200	2,500	2,800	3,500	3,500
		CM66325	Planned orders	1,000	2,000	1,000	1,500	2,000	2,500	3,000	3,000
			Current scheduled receipts	2,000	1,000	1,000	1,000	500	0	0	0
			Total supply	3,000	3,000	2,000	2,500	2,500	2,500	3,000	3,000
			Gross requirements	2,500	2,500	2,200	2,200	2,500	2,800	3,500	3,500
	Projected available balance		500	1,000	800	1,100	1,100	800	300	300	

Save and CloseCancel

A context menu opens.

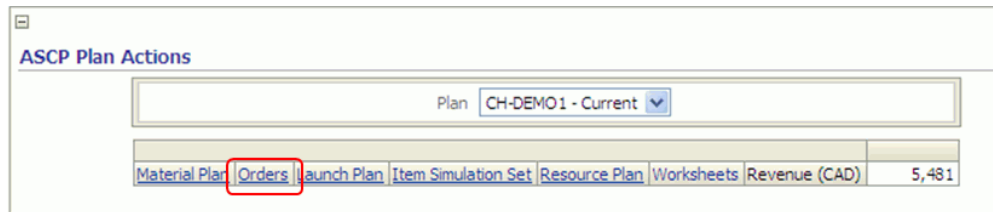
3. From the context menu, select Order.

Option 2: Accessing Orders UI Directly from ASCP Plan Actions

1. From the Supply Chain Analyst Dashboard, click either the Plan Health Summary

tab or the Demand and Supply tab.

2. In the ASCP Plan Actions pane, click Orders.



3. Select the desired plan, either baseline or comparison, from the plan pull-down

Note: Archived plans are not available for selection.

In addition, the Organization and Category dashboard page filters are passed in as context into the Orders UI.

Using the Demand and Supply Page

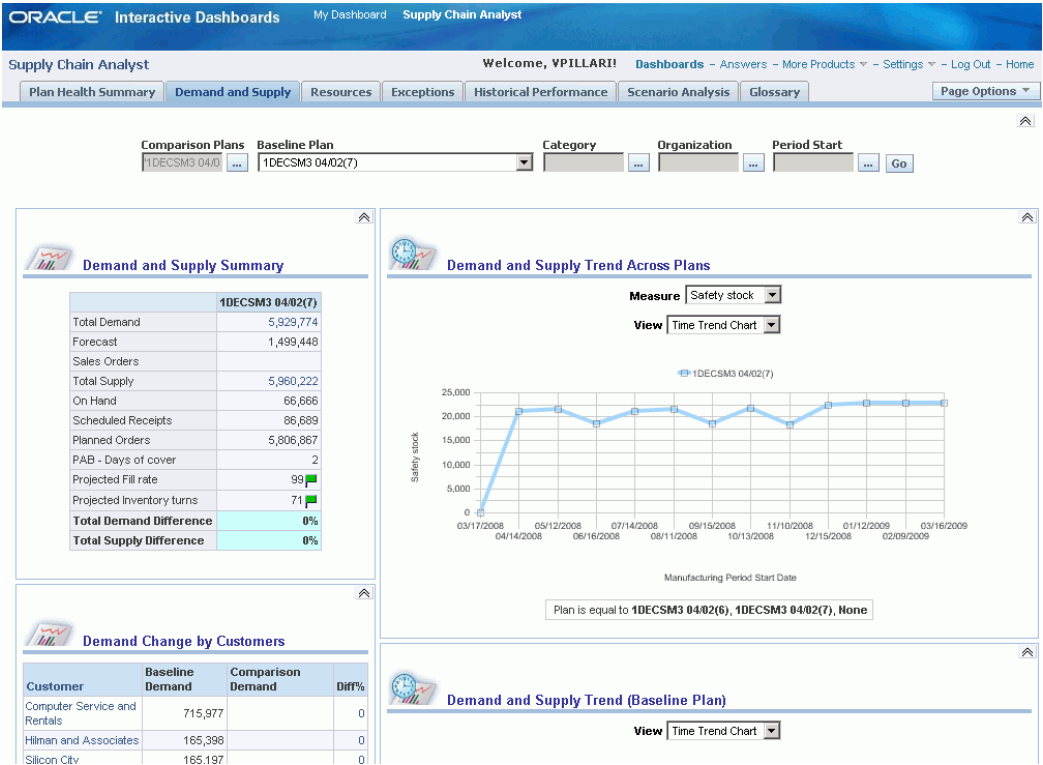
This section provides an overview of the Demand and Supply page and discusses:

- Page-level filters
- Demand and Supply Summary
- Demand Change by Customers
- Supply Change by Categories
- Demand and Supply Trend Across Plans
- Demand and Supply Trend (Baseline Plan)
- Total Demand by Customers (Baseline Plan)
- Total Supply by Categories (Baseline Plan)
- Excess and Obsolescence
- Oracle Rapid Planning Supply Demand Plan Drill-downs

Understanding the Demand and Supply Page

The Demand and Supply page enables the supply chain analyst to evaluate how demand and supply are balanced over time and how they vary from one plan to

another.



Page-Level Filters

Page-level filters are provided at the top of the page to filter the results of all reports.

This table lists the page-level filters for the Demand and Supply page:

Filter	Description
Comparison Plans	Select from a list of comparison plans. Multiple plans can be selected. This is a required field.
Baseline Plan	Select from a list of plans to use as a baseline. Only one plan can be selected. This is a required field.
Category	Select from a list of categories. Multiple categories can be selected. This is an optional field.

Organization	Select from a list of organizations. Multiple organizations can be selected. This is an optional field.
Period Start	Select from a list of date and time selections. A range of date and time can be selected. This is an optional field.

Demand and Supply Summary

The Demand and Supply Summary report enables the user to determine how demand and supply is different between a baseline plan and comparison plans.

To view the Demand and Supply Summary report, see Understanding the Demand and Supply Page, page 5-28


Additional reports that can be accessed from the Demand and Supply Summary report are (listed in alphabetical order):

- Aggregate Horizontal Plan.
- Days of Cover by Organizations.
- Demand and Supply Totals by Category.
- Demand and Supply Totals by Organization.
- Detailed Horizontal Plan.
- Exceptions Summary.
- Total Demand by Customers.
- Total Supply by Categories.
- WIP (work in progress) Start by Organizations.

Demand Change by Customers

The Demand Change by Customers report enables the user to compare demand from the baseline plan to demand from the comparison plan for multiple customers.

The difference in total demand for each customer between the two plans is computed as a percentage and the percentage is sorted in descending order. By default the report displays the top ten customers. Using the MSC: Value of N for all top/bottom-N reports in Dashboards profile, the user can adjust the number of top customers displayed.



Demand Change by Customers

Customer	Baseline Demand	Comparison Demand	Diff%
Computer Service and Rentals	715,977		0
Hilman and Associates	165,398		0
Silicon City	165,197		0
Business World	452,877		0

The customer name is a link, which can be used to display all customer sites for that customer. Use the Return or Back button to return to the report that lists all customers.


Additional reports that can be accessed from the Demand Change by Customers report are (listed in alphabetical order):

- ASCP Workbench – Supply and Demand Detail.
- Demand and Supply Trend (Baseline Plan).

Supply Change by Categories


The Supply Change by Categories report enables the user to compare supply from the baseline plan to supply from the comparison plan for multiple categories.

The difference in total supply for each category between the two plans is computed as a percentage and the percentage is sorted in descending order. By default the report displays the top ten categories. Using the MSC: Value of N for all top/bottom-N reports in Dashboards profile, the user can adjust the number of top categories displayed.



Supply Change by Categories

Category	Baseline Supply	Comparison Supply	Diff%
ASSEMBLY.SUBASSY	489,218		0
COMPONENT.MECHANICAL	312,507		0
COMPONENT.MISC	51,714		0
COMPUTER.HANDHELD	2,005,803		0
COMPONENT.PLASTIC	843,197		0


Records 1 - 5

The category name is a link, which can be used to display all items for that category. Use the Return button to return to the report that lists all categories.

An additional report that can be accessed from the Supply Change by Categories report is the Demand and Supply Trend (Baseline Plan). The ASCP Workbench – Items link takes the user directly to the Advanced Supply Chain Planner Workbench.

Demand and Supply Trend Across Plans

The Demand and Supply Trend Across Plans report enables the user to evaluate the trends of demand and supply over time and if the trends change between the baseline and comparison plans.

To view the Demand and Supply Trend Across Plans report, see Understanding the Demand and Supply Page, page 5-28

In addition to the page-level filters at the top of the page, users can specify these filters for the report:

Filter	Description
Measure	Select a measure to evaluate, which appears on the vertical axis. Options include Total Supply , PAB – units (Projected Available Balance), Safety Stock , and Total Demand .
View	<p>Select how you would like to view the report. Options include: Time Trend Chart and Time Trend Table.</p> <p>The Time Trend Chart view plots the measure option over the manufacturing period start date using a line graph. The Time Trend Table view provides the values that correspond to the Time Trend Chart view.</p>

Additional reports that can be accessed from the Demand and Supply Trend Across Plans report are (listed in alphabetical order):

- Exceptions Summary
- Days of Cover by Organization.
- Total Demand by Customers
- Total Supply by Categories
- WIP Start by Organizations

The ASCP Workbench – Items link takes the user directly to the Advanced Supply Chain Planner Workbench.

Demand and Supply Trend (Baseline Plan)

The Demand and Supply Trend (Baseline Plan) report enables the user to compare measures within a single plan. This report plots line graphs for safety stock and PAB units, and bar charts for total demand and total supply.



In addition to the page-level filters at the top of the page, users can specify this filter for the report:

Field	Description
View	<p>Select how you would like to view the report. Options include: Time Trend Chart and Time Trend Table.</p> <p>The Time Trend Chart view plots the measures over plans using a line graph and bar chart.</p> <p>The Time Trend Table view provides the values that correspond to the Time Trend Chart view.</p>

Additional reports that can be accessed from the Demand and Supply Trend (Baseline Plan) report are (listed in alphabetical order):

- Exceptions Summary.
- Days of Cover by Organizations.
- Total Demand by Customers.
- Total Supply by Categories.
- WIP Start by Organizations.

The ASCP Workbench - Items link takes the user directly to the Advanced Supply Chain Planner Workbench.

Total Demand by Customers (Baseline Plan)

The Total Demand by Customers (Baseline Plan) report displays total demand by customer in a bar chart or table format.

This report shows data for the plan selected as the baseline plan in the page filters. By default, the report displays the top 10 customers. Using the MSC: Value of N for all top/bottom-N reports in Dashboards profile, the user can adjust the number of top customers displayed.

You can access this report from multiple locations.

To access this report from the Plan Health Summary page:

1. Select the Supply Chain Analyst responsibility.
2. Select the Supply Chain Analyst Dashboard.
3. Select the Total Demand value link from the Demand and Supply Summary report.

To access this report from the Demand and Supply page:

1. Select the Supply Chain Analyst responsibility.
2. Select the Supply Chain Analyst Dashboard.
3. Select Demand and Supply tab.



In addition to the page-level filters at the top of the page, users can specify this filter for the report:

Field	Description
View	<p>Select how you want to view the report. Options include Chart and Table.</p> <p>The Chart view plots total demand for each customer using a bar graph. The Table view provides the values that correspond to the Chart view.</p>

An additional report that you can access from the Total Demand by Customers (Baseline Plan) report is the Demand and Supply Trend within a Plan report. The ASCP Workbench - Supply and Demand Detail link takes the user directly to the Advanced Supply Chain Planner Workbench.

Total Supply by Categories (Baseline Plan)

The Total Supply by Categories (Baseline Plan) displays total supply by item category in a bar chart or table format.

This report shows data for the plan selected as the baseline plan in the page filters. By default the report displays the top ten categories. Using the MSC: Value of N for all top/bottom-N reports in Dashboards profile, the user can adjust the number of top categories displayed.

You can access this report from multiple locations.

To access this report from the Plan Health Summary page:

1. Select the Supply Chain Analyst responsibility.
2. Select the Supply Chain Analyst Dashboard.
3. Select the Total Supply value link from the Demand and Supply Summary report.

To access this report from the Demand and Supply page:

1. Select the Supply Chain Analyst responsibility.
2. Select the Supply Chain Analyst Dashboard.
3. Select the Demand and Supply tab.



In addition to the page-level filters at the top of the page, users can specify this filter for the report:

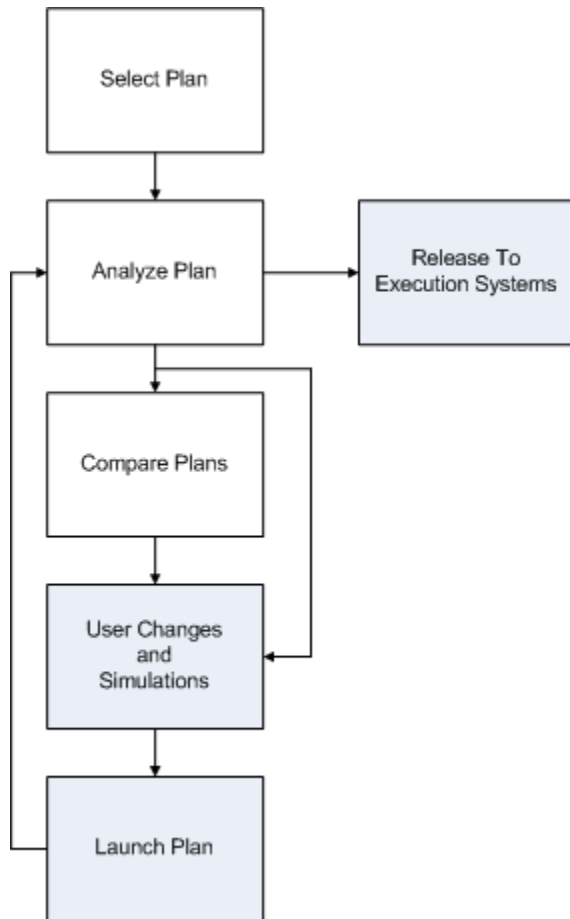
Field	Description
View	<p>Select how you want to view the report. Options include Chart and Table.</p> <p>The Chart view plots total supply for each category using a bar graph. The Table view provides the values that correspond to the Chart view.</p>

An additional report that you can access from the Total Supply by Categories report is the Demand and Supply Trend within a Plan report. The ASCP Workbench - Supply and Demand Detail link takes the user directly to the Advanced Supply Chain Planner Workbench.

Understanding the Editable Material Plan

The Material Plan allows you to conduct a typical planning flow within the application without having to navigate to other Value Chain Planning (VCP) applications, such as ASCP.

You can make edits to the plan, launch a plan and release a plan from within APCC. Release To Execution Systems, User Changes and Simulations, and Launch Plan are the features in APCC that let you complete these processes.



Using the Editable Material Plan

APCC provides the capability to mass edit a group of planned orders in a bucketed format in the context of a grouping. As an example, you can mass edit a category of items. You can edit:

- End product items to create a master schedule per time period for a family of products
- A group of component orders for a given supplier to meet a purchasing minimum or price break that applies to a group order
- A group of planned orders to consolidated "container quantity" for shipment

The Material Plan User Interface lets you mass edit supply and demand records. It displays planned orders in a bucketed format, including a set of total rows. The Material Plan provides direct editing of bucketed values whose changes are allocated back to the planned orders. The firm status of the planned orders will then be set.

Understanding the Editable Material Plan General Layout

The supply and demand records display in a bucketed horizontal format similar to the format of the horizontal plan, but with a restricted set of series. The records that are displayed contain all the items that you included in the criteria that was passed in as context, as well as an additional row or set of rows for the category of items in the search as a calculated total. You can edit the value for the individual items, and view the sum in the category change field in real time.

An example of an editable material plan is shown below. Note that the name of the plan that was passed into the material plan is display in the title.

The screenshot shows a software window titled "Material plan: CH-DEMO1". The interface includes a menu bar with "Actions", "Setup", "Layout", "Manual Demand", and "Organization". Below the menu bar is a toolbar with icons for "Recalculate", "Page", and "Tools". The main area is a table with columns for dates: 01-Jan-2016, 04-Jan-2016, 11-Jan-2016, 18-Jan-2016, 25-Jan-2016, 01-Feb-2016, 08-Feb-2016, 15-Feb-2016, 22-Feb-2016, 29-Feb-2016, and 07-Mar-2016. The table is organized into sections: "Grand Total", "S/LC:M1", "NEW.MISC", "CH-1000", "CH-1001", and "CH-1002". Each section contains rows for "Planned orders", "Current scheduled receipts", "Total supply", "Manual demand", "Gross requirements", and "Projected available balance". The cells contain numerical values, some of which are shaded to indicate they are editable.

Understanding the Editable Material Plan Features

The editable Material Plan has the following features:

- The title of the dialogue displays the plan passed in as context.
- Based on the selected layout, the system determines how to render the editable material plan. This includes what measures and column and row headings to display.
- By default, the Grand Totals section is turned off. You can turn on Grand Totals from the View menu.
- The cells containing editable measures are shaded so that you can easily distinguish between editable and non-editable cells.
- Measures values that you change will be shaded to show that the value has changed.

The system does not recalculate Projected Available Balance and On-Hand

Inventory until you press the recalculate button. When the recalculation is completed, the cell shading disappears and returns to the editable cell status.

- When you select an alternative layout, the system refreshes the display and removes column headings that no longer apply. For example, if the original layout was set at Day and the newly selected layout is set to Period, then the Week and Day column headings are removed

Note: When loading the Material Plan table, the system loads only the number of rows that were specified in the profile option MSC:New Material and Resource Plan Fetch Size. As you scroll down, the system continues to load additional rows.

Understanding the Table Toolbar

Across the top of the Material Plan are the menus and tabs that allow you to customize your Material Plan. They include:

- Actions
- View
- Setup
- Action
- Layout
- Organization
- Category Set
- Category
- Recalculate

Actions and View are drop-down menus, providing various alternatives. The remaining options are tabs. The following section outlines each item and its function.

Actions: The Actions drop-down menu provides three options:

- Setup: Invokes the setup dialog to create, edit, and save layout information
- Recalculate: Recalculates measures, based on your latest changes
- Export to Excel: Exports all the data in the table to a Microsoft Excel spreadsheet. For details on exporting to Excel, see the

Oracle Advanced Supply Chain Planning Implementation and User's Guide Supplement.

Setup: Setup invokes the setup dialog for the currently selected layout.

Layout: Required. Defaults to your default layout. You can define your layouts and select which measures you want to see as well as the time dimension. When you choose a different layout, the system automatically redisplay the material plan using the newly selected layout.

Note: All measures that are editable in the layout of your Material Plan are highlighted

Organization: Optional. Organization filters the material plan by the selected organizations. If one or more organizations are passed in as context, these organizations will appear as selected organizations in the choicelist. If needed, you can then change which organizations you wish to view.

Category Set: Required. Defaults based on the category set passed in from the calling application. If Category Set is null, the APCC default Category Set, which is part of your user profile, is used.

Category: Filters the material plan by the selected product categories. If one or more categories are passed in as context, these categories will appear as selected categories in the choicelist. The values appearing in the list of categories is based on the chosen category set.

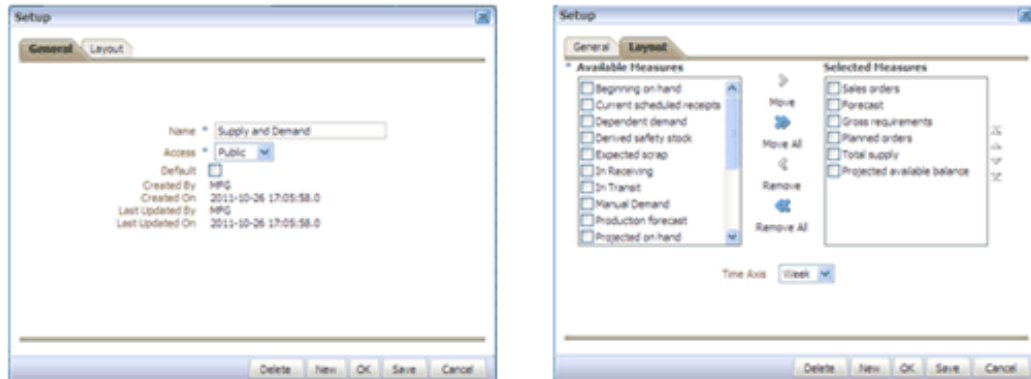
Recalculate: Recalculates measures, based on your latest changes. All the changes you make to your Material Plan are highlighted until you perform a recalculation.

Setting Up the Layout

From the main menu, go to your Setup window. In the Setup window, you can choose what rows you want displayed in your material plan and what level of bucketing is applied for time. These choices must be saved as part of a layout, which you can designate as either be private for your use only or public for use by other users.

The set up dialog for layouts of Material Plans describes:

- Each of the fields
- The function of each action button
- Available Measures
- Column headings



The table below lists and describes each field in your setup.

Name	Type	Description
Name	Text	The name of the layout. Must be unique across all layouts, public or private.
Access	Single select choicelist	Valid values are: <ul style="list-style-type: none"> Private: The layout is only accessible by the creator of the layout. Public: The layout is accessible to all users.
Default	Checkbox	Defines your default layout. You can only have one default layout across all layouts, whether it's private or public layout.
Created By	Text	Identifies the user who originally created the layout
Created On	Date/Time	Displays the date and time the layout was created
Last Updated By	Text	Identifies the user that last updated the layout.

Available Measures	Shuttle	Displays the measures that are available for display, but have not yet been added to the selected measures. See list of available measures in the Available Measures table below.
Selected Measures	Shuttle	Displays the measures selected for display. You can move the measures up or down in the list to control the sequence in which measures are displayed. At least one measure must be selected before the layout can be saved.
Axis	Single select choicelist	Required. Valid Values are: <ul style="list-style-type: none"> • Day • Week • Period

Action Buttons

The Action buttons and their purpose are shown in the table below.

Name	Description
Delete	Deletes the layout. When you choose to delete a layout, you will be prompted to confirm the deletion. If you delete your default layout, then the system selects the first public layout.

New	<p>When you press New, the values in the General and Layout Tabs are reset accordingly:</p> <ul style="list-style-type: none"> • The Name and Default fields are cleared. • The access to Public layouts (the default). • The selected measures are retained from whatever view you were displaying prior to selecting the New button. • The time axis defaults to Week.
OK	<p>When you select OK, the system redisplay the material plan using the latest values that are changed in the layout dialog. For example, if you change the time axis from week to period and press OK, the system redisplay the material plan aggregated to period, even though the change has not yet been saved to the layout.</p>
Save	<p>Saves the layout with the latest changes.</p>
Cancel	<p>Cancels out of the layout set up. No changes are saved.</p>

Available Measures

The measures that are available for inclusion in the layout are:

Measure	Editable (Yes/No)
Beginning on hand	No, but recalculated as edits are applied.
Current scheduled receipts	No
Dependent demand	No
Gross requirements	No, but recalculated as edits are applied.
Forecast	Yes

Manual Demand	Yes
Planned Orders	Yes
Projected Available Balance	No, but recalculated as edits are applied.
Projected on hand	No, but recalculated as edits are applied.
Purchase orders	No
Requisitions	No
Sales Orders	No
Safety Stock	No
Total Supply	No, but recalculated as edits are applied.
Work Orders	No

Column Headings

The column headings of the editable material plan are based on the Time Axis selected, as follows:

- If Day is selected as the time axis, then the column headings are Period, Week and then Day.
- If Week is selected as the time axis, then the column heading is Period and then Week.
- If Period is selected as the time axis, then the column heading is Period only.

Row Headings

The row headings of the editable material plan are fixed as:

- Organization
- Category
- Item

Passing in Context

The editable material plan assumes that context will be passed in from the calling

application. For example, the context will be passed from an OBIEE query into the material plan. Navigation options are described below. A combination of the following values can be passed in as context:

- Plan (Required, single value)
- Organization (Optional, single or multiple values)
- Category Set (Required, single value)
- Product Category (Optional, single or multiple values)

If Category Set is null, the APCC default Category Set, which is part of your user profile, is used.

If both Organization and Product Category values are missing from the context, the system defaults to the first organization/category combination for filtering. You can then choose whether to display all organization/category combinations or only ones you select.

Note: While navigation from OBIEE is generally passing single values (e.g., clicking on a single product category and navigating to the editable material plan), the editable material plan is also going to be called from ASCP personal queries which could pass multiple organizations or product categories into the editable material plan.

Allocating Bucketed Quantities

When you edit a cell that contains a bucketed quantity in the editable Material Plan, the behavior is identical to the behavior when editing data in the Material Plan in Rapid Planning. When you update cells, the quantity you entered and the date are interpreted as the firm quantity and firm date for the row that corresponds to that cell.

How editing behaves is shown in the table below for your reference:

Measure	View By	Time	Type of Action	User Action to Update	Interpretation of the Update
Forecast	Item-Org/Org-Item/	Days/Weeks/Periods	Update	Edit Cell	

Manual Demand	Item-Org/Org-Item/	Days/Weeks/Periods	Update	Edit Cell	The net difference % is calculated, based on the difference between the new value and old value, and the same percent, either up or down, is applied to all rows that constitute this number and the firm date, firm qty fields are updated on them.
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Manual Demand	Item-Org/Org-Item	Days/Weeks/Periods	Create	Edit a Zero value Cell	Allowed only at item-org or org-item level. The new value is used to create a new "manual demand" row for that item/org (if the context is item/org). If the cell corresponds to any level higher than item/org, then disallow create. On the time dimension, if the cell corresponds to a week/period, insert the demand in the last working day.
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Planned Orders	Item-Org/Org -Item	Days/Weeks/ Periods	Update	Update	The net difference % is calculated, based on the difference between the new value and old value, and the same percent, either up or down, is applied to all rows that constitute this number and the firm date, firm quantity fields are updated on them.
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Planned Orders	Item-Org/Org -Item	Days/Weeks/ Periods	Create	Edit a Zero Value Cell	Allowed only at item-org or org-item. The new value is used to create a new firm Planned Order row for that item/org, if the context is item/org. If the cell corresponds to any level higher than item/org, disallow create. If the cell corresponds to a week/period, insert the supply in the last working day.
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Saving Changes

As you make your edits to the Material Plan, the system updates the firm date, firm quantity and firm status of the edited planned orders, as well as forecast records, or manual demands that make up the bucketed number. These changes are not committed to the database until you choose to save and close the Material Plan dialog. If there are unsaved changes to the Material Plan when you try to close it, you will be asked whether or not you want to save your changes.

Navigating to the Editable Material Plan

You navigate to the Editable Material Plan using any one of the following options:

- From Demands and Supply totals by category query
- From the Aggregate Horizontal Plan, drill down to the Material Plan
- From the dashboard

The plan pull down in the ASCP Plan Actions section allows you to choose either the baseline plan or the comparison plans that you wish to carry as context into the ASCP

Plan Actions.

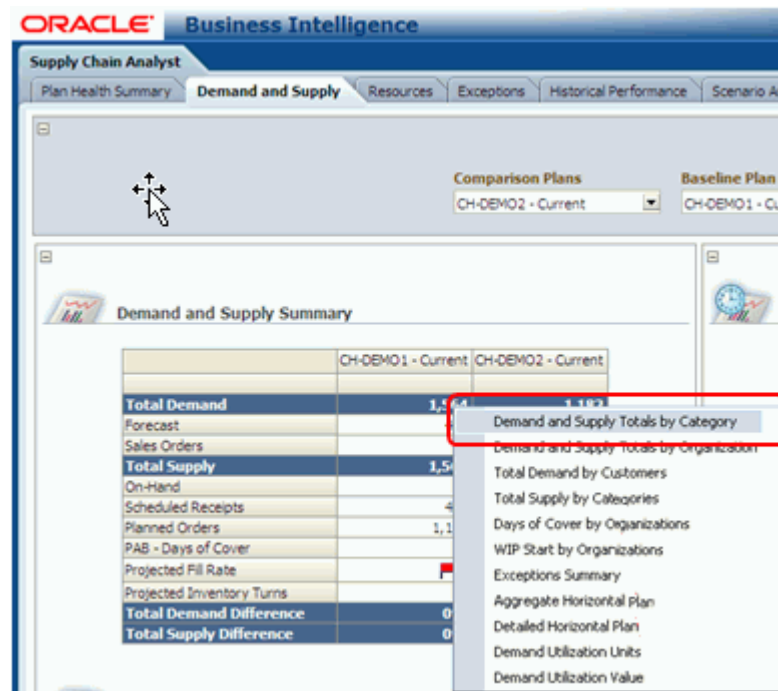
Note: Archived plans are not available for selection.

In addition, the Category and Organization dashboard page filters are passed in as context into the Material Plan as follows:

- If Category Set is null, the system uses the APCC default Category Set that is part of your user profile.
- If both the Organization and Category prompts are null, that is, the page is not filtered by organization or category, the Material Plan selects the first organization/category combination, thus limiting the amount of data displayed. You can then change the filter fields to the desired organization/category combinations.

Navigating to the Editable Material Plan from Demands and Supply Totals Category:

1. From the Supply Chain Analyst dashboard, select Demand and Supply Totals by Category, which is the first option on the list of available navigation options.



2. From Demand and Supply Totals by Category, select Material Plan.
The Plan name and category are passed in as context to the Material Plan.

ORACLE Business Intelligence

Supply Chain Analyst

 Demand and Supply Totals by Category

	Item		Demand			Supply				
Plan	Category	Material Plan	Forecast	Sales Orders	Total	On Hand	Scheduled Receipts	Planned Orders	Days of Cover	Total
CH-DEMO1 - Current	NEW.MISC	Link	492	37	1,564	0	441	1,123	0	1,564

Total Demand for all Categories is 1564.00
Total Supply for all Categories is 1564.00

- Click the icon next to the desired category.

The editable Material Plan for that Plan/Category combination launches.

Navigating to the Editable Material Plan from the Aggregate Horizontal Plan:

- From the Supply Chain Analyst dashboard, open Demand and Supply.
- From Demand and Supply, select Aggregate Horizontal Plan, which is the eighth option on the list of available navigation options.

ORACLE Business Intelligence

Supply Chain Analyst

Plan Health Summary **Demand and Supply** Resources Exceptions Historical Performance Scenario Analysis

Comparison Plans: CH-DEMO2 - Current Baseline Plan: CH-DEMO1 - Current

Demand and Supply Summary

	CH-DEMO1 - Current	CH-DEMO2 - Current
Total Demand	1,564	1,182
Forecast	492	
Sales Orders	37	
Total Supply	1,564	
On-Hand		
Scheduled Receipts	441	
Planned Orders	1,123	
PAB - Days of Cover		
Projected Fill Rate		
Projected Inventory Turns		
Total Demand Difference	0%	
Total Supply Difference	0%	

- Demand and Supply Totals by Category
- Demand and Supply Totals by Organization
- Total Demand by Customers
- Total Supply by Categories
- Days of Cover by Organizations
- WIP Start by Organizations
- Exceptions Summary
- Aggregate Horizontal Plan**
- Detailed Horizontal Plan
- Demand Utilization Units
- Demand Utilization Value

- Select the Material Plan link.

Navigating to the Editable Material Plan from the Dashboard:

- Navigate to either the Plan Health Summary link or the Demand and Supply link.

2. From the ASCP Plan Actions window on the right-hand side of your window, select Material Plan.

Rapid Planning Supply Demand Plan Drilldowns

The Supply Demand Plan in Rapid Planning is accessible from the following APCC reports:

- Demand and Supply Totals by Category
- Demand and Supply Totals by Organization
- Total Demand by Organization
- Total Demand by Customers
- Total Supply by Category
- Days of Cover by Organization
- WIP Start Trend
- Aggregate Horizontal Plan
- Detailed Horizontal Plan
- Change in Demand by Customers

The context that must be passed to Rapid Planning is one of the following:

- Plan, Item
- Plan, Item, Organization
- Plan, Organization

Below is an example of the Supply Demand Plan, open at the Main page. At the top right of the screen are tabs, which let you open Exceptions, Items, Material Plan, BOMs, or Sourcing Rules. The page is in the format of a table, with the following columns:

- Item. This column lists your plans.
- Org
- Order type
- Sugg Due Date

- Order Number
- Order Qty
- Pegged Qty
- Customer
- Firm Status

Supply & Demand

Search Supply & Demand

My Late Orders

Action

View

Exceptions

Items

Material Plan

BOMs

Sourcing Rules

Main

Release

Other

Item	Org	Order Type	Sugg Due Date	Order Number	Order Qty	Pegged Qty	Customer	Firm Status
AS18947	121:M1	Sales Order	04-Aug-08	WMT-1010	-10,000		Wal-Mart	Unfirm
AS10111	121:M1	Sales Order	04-Sep-08	SO-90909	-20		Acme	Unfirm
AS90101	121:M1	Sales Order	15-Jul-08	SO-409	-400		Acme	Unfirm
AS10111	121:M1	Sales Order	09-Sep-08	XYZ-101	-1,000		Wal-Mart	Unfirm

The exceptions and resource plan views are similar to the Supply & Demand report. When you click on the exceptions tab, you go to the Exceptions view; the Resource Plan is similar to the Supply Demand view.

Excess and Obsolescence

This section describes the excess and obsolescence analyses that are available through the Supply and Demand page of the SCA Dashboard. It discusses the following reports:

- Excess and Obsolescence Summary
- Excess Details
- Obsolescence Details
- Excess Details Across Plans
- Obsolescence Details Across Plans

In addition to the Excess and Obsolescence reports, two fields in the Item Attributes Mass Maintenance window, Excess Horizon Days and Obsolescence Date, help capture the excess and obsolescence horizons. These fields indicate the horizon that is used in the computation of Excess and Obsolescence. Excess Horizon Days is a number field while Obsolescence Date is a date field with the format DDMONYY. For example,

12JUN10 is June 12th, 2010.

The selection of a plan option triggers the summarization of Excess Horizon Days and Obsolescence Date from the Item Attributes Mass Maintenance to APCC schema as part of the archive workflow. It also triggers the computation of Excess and Obsolescence. The plan type and the corresponding plan option are shown in the table below:

S. No.	Plan Type	Plan Option
1	Advanced Supply Chain Planning	Calculate Key Performance Indicators
2	Service Parts Planning	Calculate Key Performance Indicators
3	Distributed Replenishment Planning	Calculate Key Performance Indicators
4	Rapid Planning	Expose in Planning Analytics

Excess and Obsolescence Reports

This section describes the Excess and Obsolescence Reports. From the Excess and Obsolescence Summary Report, you can drill down to additional reports for a given plan:

- Obsolescence by Category. From this report, you can drill down to two additional reports:
 - Obsolescence by Item for a given plan or category
 - Aggregate Horizontal Plan for a given plan or category
- Obsolescence by Category Organization. From this report, you can drill down to three additional reports:
 - Obsolescence by Item Organization for a given plan or category
 - Obsolescence by category for a given plan or category
 - Aggregate Horizontal Plan for a given plan or category
- Aggregate Horizontal Plan, from which you can follow the Demand and Supply flow for any given plan.
- Excess by Category Report. From this report, you can drill down to two additional

reports:

- Excess by Item for a given plan or category

From this plan, you can access the dashboard drill-down reports.

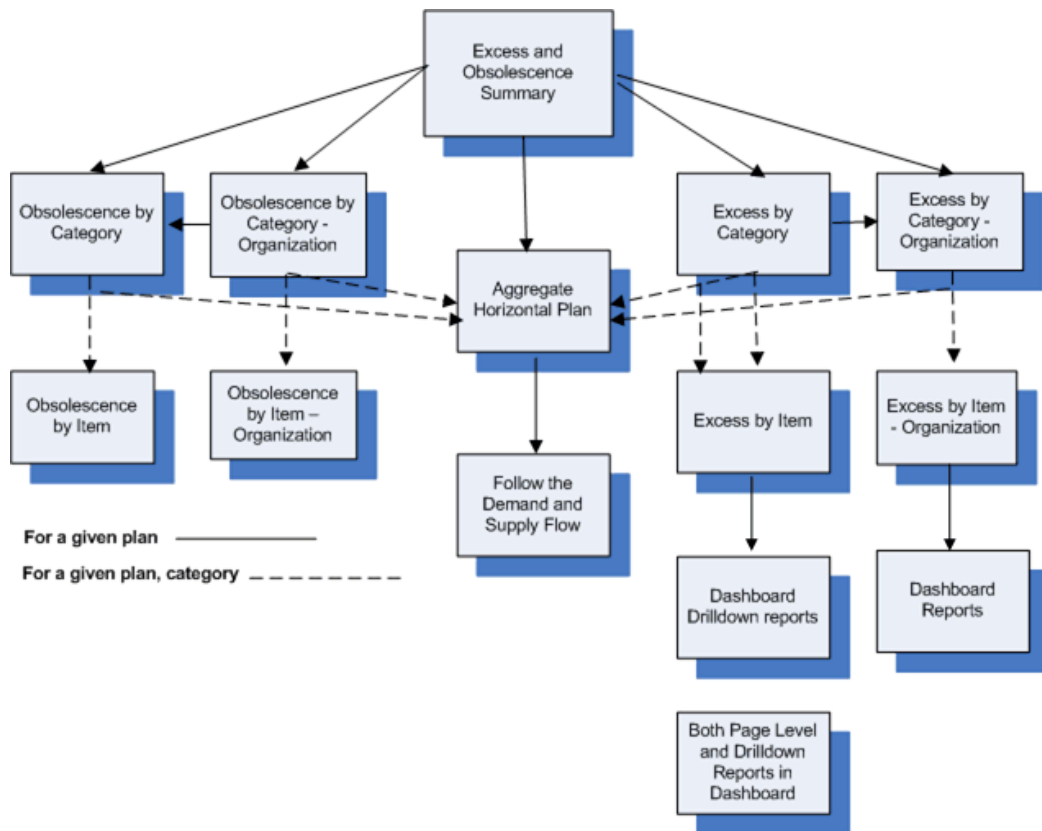
- Aggregate Horizontal Plan for a given plan or category

- Excess by Category Organization Report. From this report, you can drill down to two additional reports:

- Excess by Item Organization for a given plan or category

From this plan, you can access the dashboard reports.

- Aggregate Horizontal Plan for a given plan or category



Using the Resources Page

This section provides an overview of the Resources page and discusses:

- Page-Level filters.

- Resource Summary.
- Most Utilized Resources (baseline plan).
- Least Utilized Resources (baseline plan).
- Resources with Change in Utilization.
- Resource Utilization Trend.
- Rapid Planning Resource Plan drill-downs

Understanding the Resources Page

The Resources page enables the supply chain analyst to evaluate how resource utilization has changed from one plan to another.



Page-Level Filters

Page-level filters are provided at the top of the page to filter the results of all reports.

This table lists the page-level filters for the Resources page:

Filter	Description
Comparison Plans	Select from a list of comparison plans. Multiple plans can be selected. This is a required field.
Baseline Plan	Select from a list of plans to use as a baseline. Only one plan can be selected. This is a required field.
Organization	Select from a list of organizations. Multiple organizations can be selected. This is an optional field.
Resource Group	Select from a list of resource groups. Multiple resource groups can be selected. This is an optional field.
Period Start	Select from a list of date and time selections. A range of date and time can be selected. This is an optional field.

Resource Summary

The Resource Summary report enables the user to determine how resource utilization varies between baseline and comparison plans.

To view the Resource Summary report, see Understanding the Resources Page, page 5-57

Additional reports that you can access from the Resource Summary report are (listed in alphabetical order):

- Least Utilized Resources.
- Most Utilized Resources.

Click Resource Utilization % to access these reports:

- Exception Summary.
- Resource Utilization by Organizations.
- Resource Utilization by Resource Groups.

Most Utilized Resource (Baseline Plan)

The Most Utilized Resource (Baseline Plan) report enables the user to view the resources that are used the most for the baseline plan.

This report shows data for the plan selected as the baseline plan in the page filters. By default, the report displays the top 10 resources. Using the MSC: Value of N for all top/bottom-N reports in Dashboards profile, the user can adjust the number of top resources displayed.

To view the Most Utilized Resource Baseline Plan report, see Understanding the Resources Page, page 5-57

In addition to the page level-filters at the top of the page, users can specify this filter for the report:

Field	Description
View	Select how you want to view the report. Options include Chart and Table . The Chart view plots resource utilization for each resource using a bar graph. The Table view provides the values that correspond to the Chart view.

An additional report that you can access from the Most Utilized Resources (Baseline Plan) report is the Resource Utilization Trend report. The ASCP Workbench – Resources link takes the user directly to the Advanced Supply Chain Planner Workbench.

Least Utilized Resources (Baseline Plan)

The Least Utilized Resource (Baseline Plan) report enables the user to view the resources that are used the least for the baseline plan.

This report shows data for the plan selected as the baseline plan in the page filters. By default, the report displays the bottom 10 resources. Using the MSC: Value of N for all top/bottom-N reports in Dashboards profile, the user can adjust the number of resources displayed.

To view the Least Utilized Resource Baseline Plan report, see Understanding the Resources Page, page 5-57

In addition to the page-level filters at the top of the page, users can specify this filter for the report:

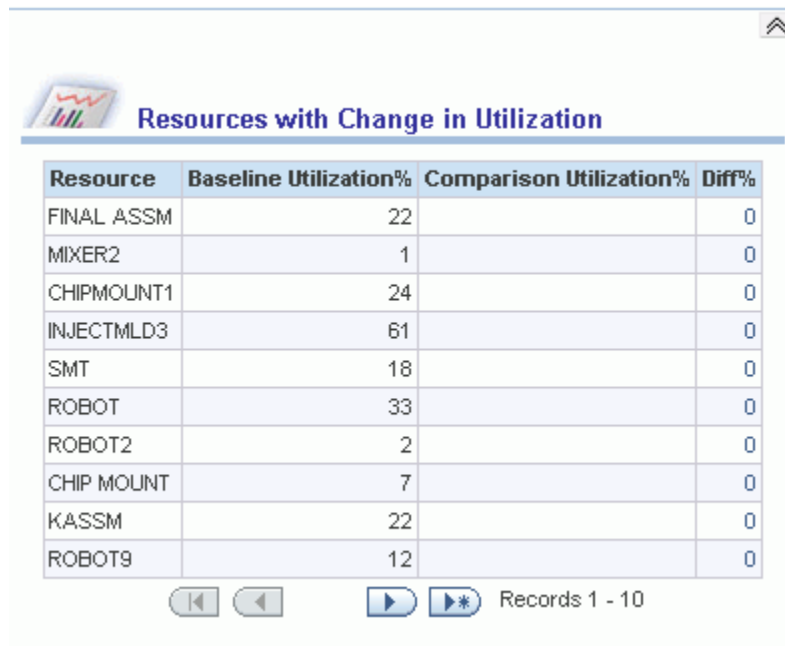
Field	Description
View	<p>Select how you want to view the report. Options include Chart and Table.</p> <p>The Chart view plots resource utilization for each resource using a bar graph. The Table view provides the values that correspond to the Chart view.</p>

An additional report that you can access from the Least Utilized Resources (Baseline Plan) report is the Resource Utilization Trend report. The ASCP Workbench – Resources link takes the user directly to the Advanced Supply Chain Planner Workbench.

Resources with Change in Utilization

Utilization varies, for each resource, between baseline and comparison plans.

The difference in utilization percent for each resource between the two plans is computed as a percentage and the percentage is sorted in descending order. By default the report displays the top 10 resources with the most change. Using the MSC: Value of N for all top/bottom-N reports in Dashboards profile, the user can adjust the number of top resources displayed.

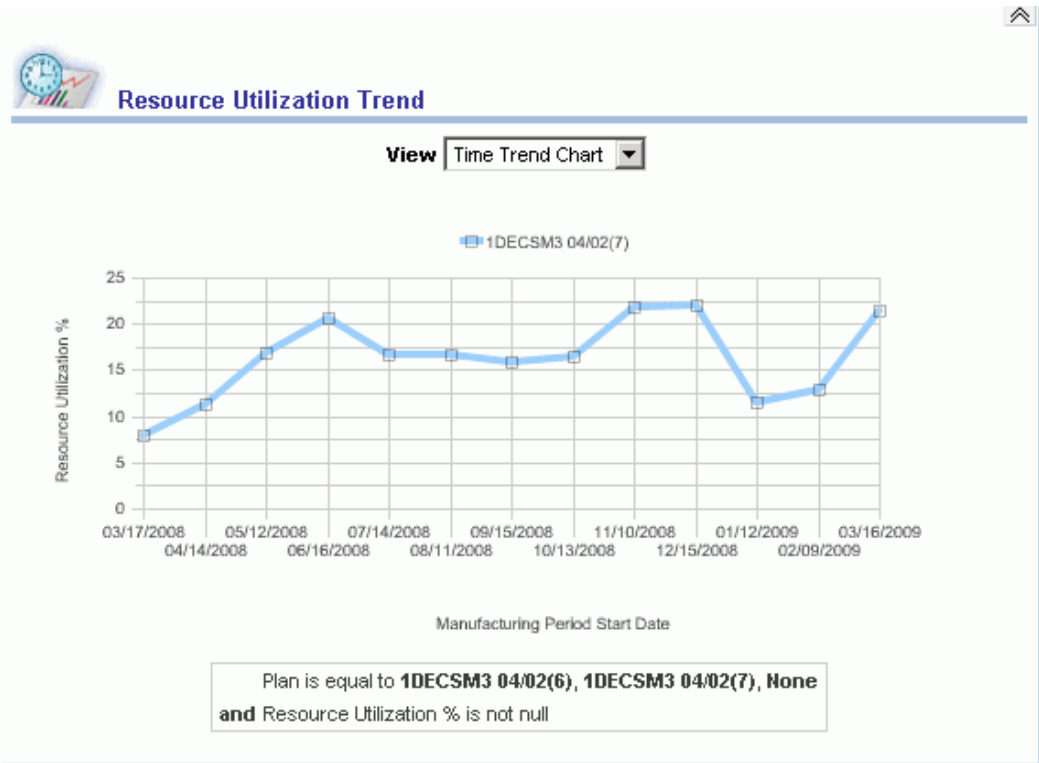


Resource	Baseline Utilization%	Comparison Utilization%	Diff%
FINAL ASSM	22		0
MIXER2	1		0
CHIPMOUNT1	24		0
INJECTMLD3	61		0
SMT	18		0
ROBOT	33		0
ROBOT2	2		0
CHIP MOUNT	7		0
KASSM	22		0
ROBOT9	12		0

Records 1 - 10

Resource Utilization Trend

The Resources Utilization Trend report enables the user to determine how resources are used over time and whether the trend has changed between the baseline and comparison plans.



In addition to the page-level filters at the top of the page, users can specify this filter for the report:

Field	Description
View	<p>Select how you want to view the report. Options include Time Trend Chart and Time Trend Table.</p> <p>The Chart view plots resource utilization over manufacturing period start dates using a line graph. The Table view provides the values that correspond to the Chart view.</p>

Additional reports that you can access from the Resource Utilization Trend report are (listed in alphabetical order):

- Exception Summary.
- Least Utilized Resources.
- Most Utilized Resources.
- Resource Utilization by Organizations.
- Resource Utilization by Resource Groups.

Rapid Planning Resource Plan Drilldowns

The Resource Plan in Rapid Planning is accessible from the following APCC reports:

- Resource Utilization by Resource Groups
- Resource Utilization by Organization
- Resource Utilization by Department
- Most Utilized Resources
- Least Utilized Resources
- Resources with Change in Utilization

The context that needs to be passed to Rapid Planning is one of the following:

- Plan, Resource
- Plan, Department, Resource

Understanding the Editable Resource Plan

APCC allows you to easily add resource capacity at an aggregate level. For example, you can add capacity to a resource at a week or period level. The Resource Plan provides direct editing of bucketed values whose changes are allocated back to the resource's daily availability.

The resource records are displayed in a bucketed format, including a set of grand total rows. The records that are displayed include all the resources that you included in the criteria that was passed in as context, as well as an additional row or set of rows for the grand totals of all selected resources. As you edit the value for individual resources, the grand total changes in real time.

The screenshot shows a software window titled "Resource plan: CH-DEM01". It features a menu bar with "Actions", "View", "Setup", "Layout", "Default ResourcePlan", "Organization", "Department", "Resource", and "Recalculate". Below the menu bar is a table with columns for dates from 31-Dec-2015 to 07-Mar-2016. The table is organized into sections: "Grand Total" and "SLC:M1 ASSEMBLY LBR-ASSY1". The "Grand Total" section includes rows for Required hours, Available hours, Capacity load ratio, Net hours available, Non-standard jobs, Planned orders, Work orders, Total resource cost, and Cumulative hours available. The "SLC:M1 ASSEMBLY LBR-ASSY1" section includes rows for Required hours, Available hours, Capacity load ratio, Net hours available, Non-standard jobs, Planned orders, Work orders, and Total resource cost. The table cells contain numerical values, with some cells shaded grey to indicate editable measures.

	31-Dec-2015	01-Jan-2016	04-Jan-2016	11-Jan-2016	18-Jan-2016	25-Jan-2016	01-Feb-2016	08-Feb-2016	15-Feb-2016	22-Feb-2016	29-Feb-2016	07-Mar-2016
Grand Total												
Required hours	0.00	3.00	5.00	7.00	13.03	89.00	119.78	119.82	75.67	0.00	0.00	0.00
Available hours	0.00	24.00	120.00	120.00	120.00	120.00	120.00	120.00	120.00	120.00	120.00	480.00
Capacity load ratio	0.00	12.50	4.17	5.83	10.86	74.17	99.82	99.85	63.06	0.00	0.00	0.00
Net hours available	0.00	21.00	115.00	113.00	106.97	31.00	0.22	0.18	44.33	120.00	120.00	480.00
Non-standard jobs	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Planned orders	0.00	0.00	0.00	0.00	0.00	0.00	0.00	85.38	75.67	0.00	0.00	0.00
Work orders	0.00	3.00	5.00	7.00	13.03	89.00	119.78	34.43	0.00	0.00	0.00	0.00
Total resource cost	0.00	0.00	0.00	0.00	0.00	0.00	0.00	15,855.70	14,051.31	14,051.31	14,051.31	14,051.31
Cumulative hours available	0.00	24.00	144.00	264.00	384.00	504.00	624.00	744.00	864.00	984.00	1,104.00	1,584.00
SLC:M1 ASSEMBLY LBR-ASSY1												
Required hours	0.00	3.00	5.00	7.00	13.03	89.00	119.78	119.82	75.67	0.00	0.00	0.00
Available hours	0.00	24.00	120.00	120.00	120.00	120.00	120.00	120.00	120.00	120.00	120.00	480.00
Capacity load ratio	0.00	12.50	4.17	5.83	10.86	74.17	99.82	99.85	63.06	0.00	0.00	0.00
Net hours available	0.00	21.00	115.00	113.00	106.97	31.00	0.22	0.18	44.33	120.00	120.00	480.00
Non-standard jobs	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Planned orders	0.00	0.00	0.00	0.00	0.00	0.00	0.00	85.38	75.67	0.00	0.00	0.00
Work orders	0.00	3.00	5.00	7.00	13.03	89.00	119.78	34.43	0.00	0.00	0.00	0.00
Total resource cost	0.00	0.00	0.00	0.00	0.00	0.00	0.00	15,855.70	14,051.31	14,051.31	14,051.31	14,051.31

Understanding the Editable Resource Plan Features

The editable Resource Plan has the following features:

- The title of the dialogue displays the plan passed in as context.
- Based on the selected layout, the system determines how to render the editable Resource Plan. This includes which measures, column, and row headings to display.
- The cells containing editable measures are shaded so that you can easily distinguish between editable and non-editable cells.
- Measures values that you change will be shaded to show that the value has changed. The system does not recalculate your changes and refresh the display until you press the recalculate button. When the recalculation is completed, the cell shading disappears and returns to the editable cell status.
- When you select a different layout, the system refreshes the display and removes column headings that no longer apply.

Understanding the Table Toolbar

Across the top of the Resource Plan are the menus and tabs that allow you to customize your Resource Plan. They include:

- Action
- View
- Setup
- Layout
- Organization
- Department
- Resource

- Recalculate

Action and View are drop-down menus, providing various alternatives. The remaining options are tabs. The following section outlines each item and its function.

Action: The Action drop-down menu provides three options:

- Setup: Setup invokes the setup dialog to create, edit, and save layout information.
- Recalculate: Recalculates measures, based on your latest changes.
- Export to Excel: Exports all the data in the table to a Microsoft Excel spreadsheet. For details on exporting to Excel, see the *Oracle Advanced Supply Chain Planning Implementation and User's Guide Supplement*.

View: Lets you toggle between Hide Totals and Show Totals.

Setup: Invokes the setup dialog for the currently selected layout.

Layout: Required. It defaults to your default layout. When you choose a different layout, the system automatically redisplay the Resource Plan using the newly selected layout.

Organization: Filters the Resource Plan by the selected organizations. If one or more organizations are passed in as context, these organizations will appear as selected organizations in the choicelist; if needed, you can then change which organizations they wish to see.

Department: Filters the Resource Plan by the selected departments. If one or more departments are passed in as context, these departments will appear as selected departments in the choicelist.

Resource: Filters the Resource Plan by the selected resource(s). If one or more resources are passed in as context, these resources will appear as selected resources in the choicelist.

Search: Refreshes the display based on the current values in the filter fields

Hide Totals/Show Totals: Changes from Hide Totals to Show Totals based on whether totals are currently displayed. This allows you to toggle the display of the totals to On or Off.

Export to Excel: Exports all the data in the table to a Microsoft Excel spreadsheet.

Recalculate: Updates cumulative measures.

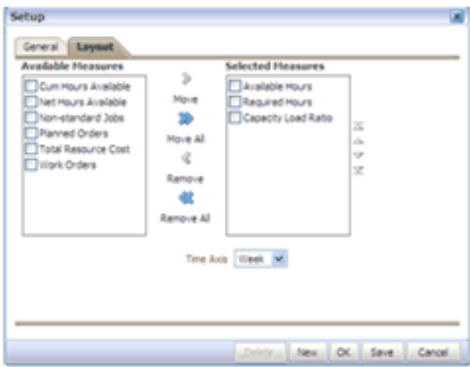
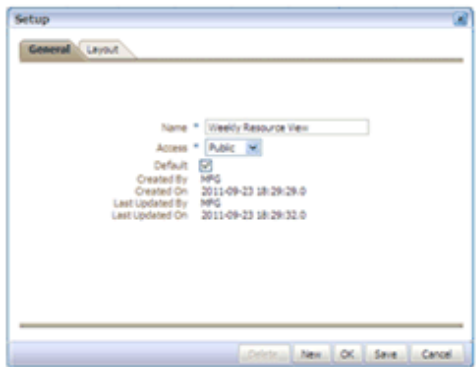
Setting up the Layout

From the main menu, go to the Setup window. In the Setup window, you can choose what rows you want displayed in your Resource Plan and what level of bucketing is applied for time. These choices must be saved as part of a layout that you can designate as either private for your use only or public for use by other users.

The set up dialog for layouts of Resource Plans is illustrated below, followed by a table

describing:

- Each of the fields
- The function of each action button
- Available measures
- Column headings
- Row headings



Field Descriptions

The table below lists and describes the fields in the setup dialog.

Name	Description
Name	The name of the layout. Must be unique across all layouts, public or private.
Access	Valid values are: <ul style="list-style-type: none">• Private: The layout is only accessible by the creator of the layout.• Public: The layout is accessible to all users.
Default	Defines your default layout. You can only have one default layout across all layouts, whether it's private or public layout.
Created By	Identifies the user who originally created the layout

Created On	Displays the date and time the layout was created
Last Updated By	Identifies the user that last updated the layout.
Available Measures	Displays the measures that are available for display, but have not yet been added to the selected measures. See list of available measures in the Available Measures table below.
Selected Measures	Displays the measures selected for display. You can move the measures up or down in the list to control the sequence in which measures are displayed. At least one measure must be selected before the layout can be saved.
Time Axis	Required. Valid Values are: <ul style="list-style-type: none"> • Day • Week • Period

Action Buttons

The table below lists the Action buttons and describes their function.

Name	Description
Delete	<p>Deletes the layout. When you choose to delete a layout, you will be prompted to confirm the deletion.</p> <p>After deleting a layout, the system automatically changes the currently selected layout to your default layout.</p> <p>If you delete your default layout, then the system selects the first public layout.</p>

New	<p>When you press New, the values in the General and Layout Tabs are reset accordingly:</p> <ul style="list-style-type: none"> • The Name and Default fields are cleared. • The access to Public layouts (the default). • The selected measures are retained from whatever view you were displaying prior to selecting the New button. • The time axis defaults to Week.
OK	<p>When you select OK, the system redisplay the plan using the latest values that are changed in the layout dialog. For example, if you change the time axis from week to period and press OK, the system redisplay the plan aggregated to period, even though the change has not yet been saved to the layout.</p>
Save	Saves the layout with the latest changes.
Cancel	Cancels out of the layout set up. No changes are saved.

Available Measures

The measures that are available for inclusion in the layout are listed in the table below:

Measure	Editable (Yes/No)
Available Hours	Yes
Capacity Load Ratio	No, but recalculated as edits are applied.
Cum Hours Available	No, but recalculated as edits are applied.
Net Hours Available	No, but recalculated as edits are applied.
Non-standard Jobs	No
Planned Orders	No
Required Hours	No
Total Resource Cost	No, but recalculated as edits are applied.

Work Orders	No
-------------	----

Column Headings

The column headings of the editable material plan are based on the time axis selected.

- If Day is selected as the time axis, then the column headings are Period, Week and then Day.
- If Week is selected as the time axis, then the column heading is Period and then Day.
- If Period is selected as the time axis, then the column heading is Period only.

Row Headings

The row headings of the editable Resource Plan are fixed as:

- Organization
- Department
- Resource

Passing in Context

The editable resource assumes that context will be passed in from the calling application, from an OBIEE query into the Resource Plan. For more information and the options available, refer to the section on Navigation, below.

Note: Navigation from OBIEE generally passes single values, by clicking on a single resource and navigating to the editable Resource Plan, the editable Resource Plan is called from ASCP personal queries. These queries could pass multiple departments or resources into the editable Resource Plan.

A combination of the following values can be passed in as context:

- Plan (single select, required)
- Organization (single or multiple values)
- Department (single or multiple values)
- Resource (single or multiple value)

Allocating Bucketed Quantities

Increasing resource availability

When you allocate an increase in the availability of a resource from week to day or from period to day, the system performs as follows:

1. Front load the additional resource capacity across the available work days up to, but not exceeding 24 hours in a day. The last shift of each day (for the time bucket updated) would be extended by increasing the hours in the last shift of each day (taking into account the number of resource units).
2. If all working days have been fully allocated to the 24 hour maximum and there is left over resource capacity that still needs allocating, add capacity to the non-working days starting with the first non-working day of the time bucket and continuing with the remaining non-working days (up to 24 hours for each non working day).
3. If there is still additional capacity that must be allocated to the time bucket, increase the resource units starting with the first day of the time bucket.

For example, before any changes, Resource A's availability for the week of 12-Mar-12 is as follows:

Resource Units	Shift	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
2	1	8	8	8	8	8	0	0
2	2	8	8	8	8	8	0	0
Available Capacity (Hrs)		32	32	32	32	32	0	0

Suppose you changed the resource capacity for the week from 160 (5 x 32) to 300, an overall increase of 140 hours for the week. The system responds as follow:

1. The system starts with Monday and extends the second shift of each day by 8 hours, This adds 16 per day to the resource availability because there are two resource units available. At the end of this first step the resource availability is as follows:

Resource Units	Shift	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
2	1	8	8	8	8	8	0	0

2	2	16	16	16	16	16	0	0
Available Capacity (Hrs)		48	48	48	48	48	0	0

- Next, the system allocates the remaining 40 hours by adding availability to the non-working days, filling up the first non-working day before proceeding to the next. Since Saturday is a non-working day, the system adds one shift, shift 1, up to a duration of 24 hours.

Resource Units	Shift	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
2	1	8	8	8	8	8	20	0
2	2	16	16	16	16	16	0	0
Available Capacity (Hrs)		48	48	48	48	48	40	0

The system added a Saturday shift with a duration of 20 hours. Since there are two resource units, this represents an additional 40 hours of capacity. At this point the system stops because there are no more hours that need to be allocated.

Decreasing a resource's availability:

When allocating a decrease in the resource's availability from week to day or from period to day, the system reduces the hours proportionally. For example, if you reduce a resource's availability on a particular week from 40 hours to 30 hours, the system calculates the percent reduction (25% in this case) and reduces the availability on each day by 25%.

Saving Changes

Changes made to the Resource Plan are not committed to the database until you choose to save and close the resource plan dialogue.

Navigating the Editable Resource Plan

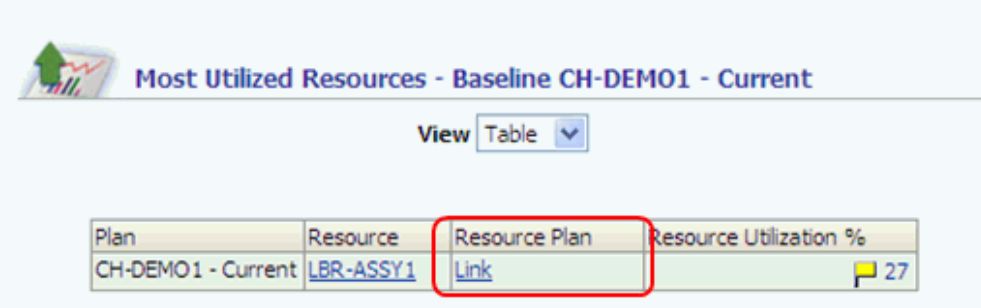
You can navigate from various APCC queries to the editable Resource Plan. The navigation must be defined as a reusable action to allow custom-built queries to call this action and pass in the appropriate context. This is similar to the way a you drill into an APCC query and launch an ASCP form. You can navigate using one of the following options:


1. Drill down from Most Utilized Resources Table
2. From ASCP Plan Actions

Accessing the Editable Resource Plan from the Most Utilized Resources Table

To access the editable Resource Plan:

1. From the Supply Chain Analyst Resource dashboard, click the Resource Plan action.
2. Drill down from the Most Utilized Resources table to the desired resource.



View Table ▼			
Plan	Resource	Resource Plan	Resource Utilization %
CH-DEMO1 - Current	LBR-ASSY1	Link	 27

Accessing the Editable Resource Plan from the ASCP Plan Actions

To access the editable Resource Plan:

1. From the Supply Chain Analyst dashboard, select either the Plan Health Summary link or the Demand Supply Link.
2. From the ASCP Plan Actions pull down, select the plan you want to carry as context into the ASCP Plan Actions, either the baseline plan or the comparison plans.

Note: Archived plans are not available for selection.

The plan name is passed in as context to the resource plan.

In addition, the Organization dashboard page filter is passed in as context into the Resource Plan. If the Organization prompt is null, that is, the page is not filtered by organization, the Resource Plan selects the first organization. This limits the amount of data displayed. You can then change the filter fields to the desired organization(s).

Understanding Item Simulation Sets

The item simulation set user interface lets you add or remove items from a simulation set as well as edit the attributes of the items within a simulation set to perform "what if" analyses. You can launch the Item Simulation Set User Interface (UI) by selecting a hyperlink from the APCC dashboard. The item simulation set name that is associated with the plan is passed into the UI as the default item simulation set. If needed, you can refine the item simulation set records you want to display by modifying the search criteria.

Item Simulation Editable Fields

To view all the editable fields in the Item Simulation Set, scroll to the right, using the horizontal scroll bar at the bottom of your Item Simulation Set screen. All the available editable fields are listed in the following table:

Column	Editable (Yes/No)	Comments
Organization	Yes, but only when inserting a new table row.	Required. Select from list of valid organizations.
Item	Yes, but only when inserting a new table row.	Required. Select from list of valid items
Description	No	Displays the item description associated with the selected item.

Category	No	Displays the product category associated with the selected item Note: If the Category Set was not passed in as context, the default APCC category set (user profile) is used to display the item's category.
ATP Components Flag	Yes	No comments
ATP Flag	Yes	No comments
Create Supply Flag	Yes	No comments
Critical Component	Yes	No comments
DRP Planned	Yes	No comments
Demand Fulfillment LT	Yes	No comments
Demand Time Fence Days	Yes	No comments
End of Life Date	Yes	No comments
Excessive Horizon Days	Yes	No comments
Excess Tolerance Percent	Yes	No comments
Fixed Days Supply	Yes	No comments
Fixed LT	Yes	No comments
Fixed Lot Multiplier	Yes	No comments
Fixed Order Qty	Yes	No comments
Forecast Control	Yes	No comments

Include in Excess and Obsolescence	Yes	No comments
MRP Planning Method	Yes	No comments
Make or Buy	Yes	No comments
Max Inventory Days of Supply	Yes	No comments
Max Inventory Window	Yes	No comments
Max Ord Qty	Yes	No comments
Min Ord Qty	Yes	No comments
Minimum Remaining Shelf Life (Days)	Yes	No comments
New Planned Order Creation	Yes	No comments
Obsolescence Date	Yes	No comments
Order Cost	Yes	No comments
Planning Time Fence Days	Yes	No comments
Post processing LT	Yes	No comments
Pre-Position Point	Yes	No comments
Preprocessing LT	Yes	No comments
Processing LT	Yes	No comments
Round	Yes	No comments
Safety Stock Days	Yes	No comments
Safety Stock Method	Yes	No comments
Safety Stock Percent	Yes	No comments

Safety Stock Value	Yes	No comments
Selling Price	Yes	No comments
Shelf Life Slack (Days)	Yes	No comments
Shortage Tolerance Percent	Yes	No comments
Shrinkage Rate	Yes	No comments
Standard Cost	Yes	No comments
Standard Deviation	Yes	No comments
Std Deviation of Interarrival	Yes	No comments
Std. Deviation for Daily Demand	Yes	No comments
Substitution Window	Yes	No comments
Unit Volume	Yes	No comments
Unit Weight	Yes	No comments
Unsatisfied Demand Factor	Yes	No comments
Variable LT	Yes	No comments
Volume UOM	Yes	No comments
Weight UOM	Yes	No comments

Note: When you insert a row into the simulation set, you can select the desired Organization/Item combination. Otherwise, the Organization and Item columns are non-editable.

Note: Once you enter a valid Organization/Item combination, the system copies the attributes from the item table into the simulation set.

Note: If you change a value, either by typing directly into the cell or through mass maintenance, the row is color coded.

Search Fields

The Search fields provide the criteria with which you can find specific simulation sets. The search fields and their functions are listed in the table below:

Column	Description
Simulation Set	<p>Required field, single select. Valid value is Equal To</p> <p>This field initially displays the item simulation set name associated with the current plan options. You can override the simulation set name if needed.</p> <p>Any rows inserted into the table are associated with this simulation set.</p>
Organization	<p>Optional field, multi-select. Valid values are:</p> <ul style="list-style-type: none">• Equal To• Starts With• Contains
Category	<p>Optional field, multi-select. Valid values are:</p> <ul style="list-style-type: none">• Equal To• Starts With• Contains
Item	<p>Optional field, multi-select. Valid values are:</p> <ul style="list-style-type: none">• Equal To• Starts With• Contains

Planner

Optional field, multi-select. Valid values are:

- Equal To
 - Starts With
 - Contains
-

Item Simulation Set Table Toolbar

The Item Simulation Set table toolbar, which is located immediately above the Item/Org columns, has an Action Menu and a View Menu. These menus provide options that allow you to perform a variety of actions on your simulation sets. Each menu is described below.

Action Menu

The Item Simulation Action drop-down menu has four options:

- Add: Inserts a new row into the table, which allows you to add a new organization/item combination to the simulation set.
- Remove: Removes the selected row(s) from the simulation set.
- Mass Edit: Displays a Mass Edit dialog, which allows you to change the attribute(s) of the selected rows
- Export to Excel: Exports all the data in the table to a Microsoft Excel spreadsheet

View Menu

Using the View drop-down menu, you can choose the columns you want to display and the order in which they appear in the table. You can also sort their sequence.

- Columns: displays the available columns and allows you to choose which columns to display.
- Reorder Columns...: Displays the visible columns, selected from the columns menu item shown above, and allows you to reorder the columns.
- Sort: Allows you to sort the active column into ascending or descending order, or to perform an advanced sort using up to three columns.

Layout Configuration

You can choose the columns to display, the order in which they appear in the table and the sort sequence by selecting the appropriate option in the View menu, described above. Your changes persist across sessions as a user profile until you change them. The layout configuration is saved automatically.

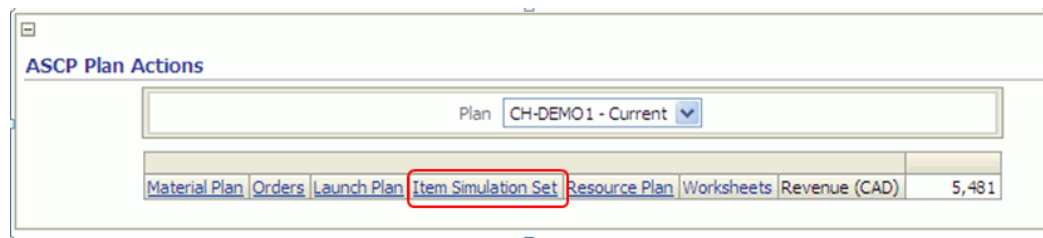
Context of the Item Simulation Set and Plan

The item simulation set name that is associated with the selected plan is passed in as context and appears in the Simulation Set Name in the search panel. You can then further refine what items you wish to see by modifying the search fields, using the drop-down menus in the Search fields. You can also select to view a different item simulation set by changing the name of the Item Simulation Set in the Simulation Set field of the Search pane.

Navigating to the Item Simulation Set

You can select the Item Simulations Set link from either the Plan Health Summary or Demand and Supply pages of the Supply Chain Analyst dashboard. In the ASCP Plan Actions pane of your screen, you can choose the plan you want to carry into context in ASCP.

Note: Archived plans are not available for selection.



As soon as you select the Item Simulation Set link, the item simulation set dialog appears.

Accessing and Editing Item Simulation Sets

To access an item simulation set:

1. Click the Plan Health Summary tab or the Demand and Supply tab of the APCC dashboard.
2. Scroll to the bottom of your page and select the desired plan, either baseline or comparison.
3. From the ASCP Plan Actions box, select Item Simulation Set.

To edit an item simulation set:

1. Choose the simulation set you want from the Simulation Set drop-down list.
2. To insert a row in the Item Simulation set, click Add in the Item Simulation Set window.

The system inserts a row at the top of the table where you can then enter the desired organization/item combination.

Item Simulation Set: CH-DEMO1

Search: Item Name, Organization, Category, Simulation Set: CH-IMMC1, Planner

Actions: View, Add, Delete, Attach, Mass Edit, Export to Excel

Organization	Item Name	Forecast Control	Include in Excess and Obsolescence	Max Inventory Days of Supply	Max Inventory Window	Minimum Remaining Shelf Life (Days)	Processing LT	Safety Stock Value	Selling Price	Shortage Tolerance Percent	Description
SLC:M1	CH-1001	None	No								Uncategorized
SLC:M1	CH-1000	None							1		Uncategorized

Save, Save and Close, Cancel

You can edit an item and attribute directly in the table or you can edit multiple items and attributes using mass edit.

- To edit several items and attributes at once, select the items you want to change using Ctrl/Shift and click Mass Edit in the table toolbar above the Org/Item columns.

You cannot edit the Org/Item columns; however you can edit the other item attributes, which are listed across the top of your Simulation Set. Click the attribute field corresponding to the Organization or Item you want to change and enter a new value or choose a value from the drop-down menu.

Item Simulation Set: CH-DEMO1

Search: Item Name, Organization, Category, Simulation Set: CH-IMMC1, Planner

Actions: View, Add, Delete, Attach, Mass Edit, Export to Excel

Organization	Item Name	Forecast Control	Include in Excess and Obsolescence	Max Inventory Days of Supply
SLC:M1	CH-1001	None	No	
SLC:M1	CH-1000	None		

Rows Selected: 2

Item Simulation Set Mass Edit

Attribute Name	Update Action	Attribute Value
Processing LT	Set Value To	2
Fixed Order Qty	Increase by Percentage	10
Obsolescence Date	Set Original Value	

Add Row, Delete Row, Apply and Close, Clear, Cancel

Save, Save and Close

Mass Editing in the Item Simulation Set

Using the Mass Edit function in the Item Simulation Set window, you can change several attributes at once.

To mass edit in an Item Simulation Set

- From the Item Simulation Set window, select the rows you want to change. To select more than one row, press Ctrl/Shift.

- Click Mass Edit, located in the Item Simulation Set window toolbar.

Attribute Name	Update Action	Attribute Value
Processing LT	Set Value To	2
Fixed Order Qty	Increase by Percentage	20
Obsolescence Date	Set Original Value	

- The Item Simulation Set Mass Edit window displays the number of rows you chose in Step 1. The columns of the window are explained in the table below:

Column	Description
Attribute Name	You can select any of the item attributes that are editable.
Update Action	<p>Determines the type of update to be made. Valid Values are:</p> <ul style="list-style-type: none"> Set Value To Increase by Value Increase by Percentage Decrease by Value Decrease by Percentage Set Original Value

Attribute Value

The value the attribute is overridden to, or increased/decreased, depending on the update action.

When update action is to Set Original Value, you cannot enter an attribute value.

4. Press Apply and Close if you are satisfied with your changes. Otherwise, press Clear to redo your changes or Cancel to close the window without making changes.

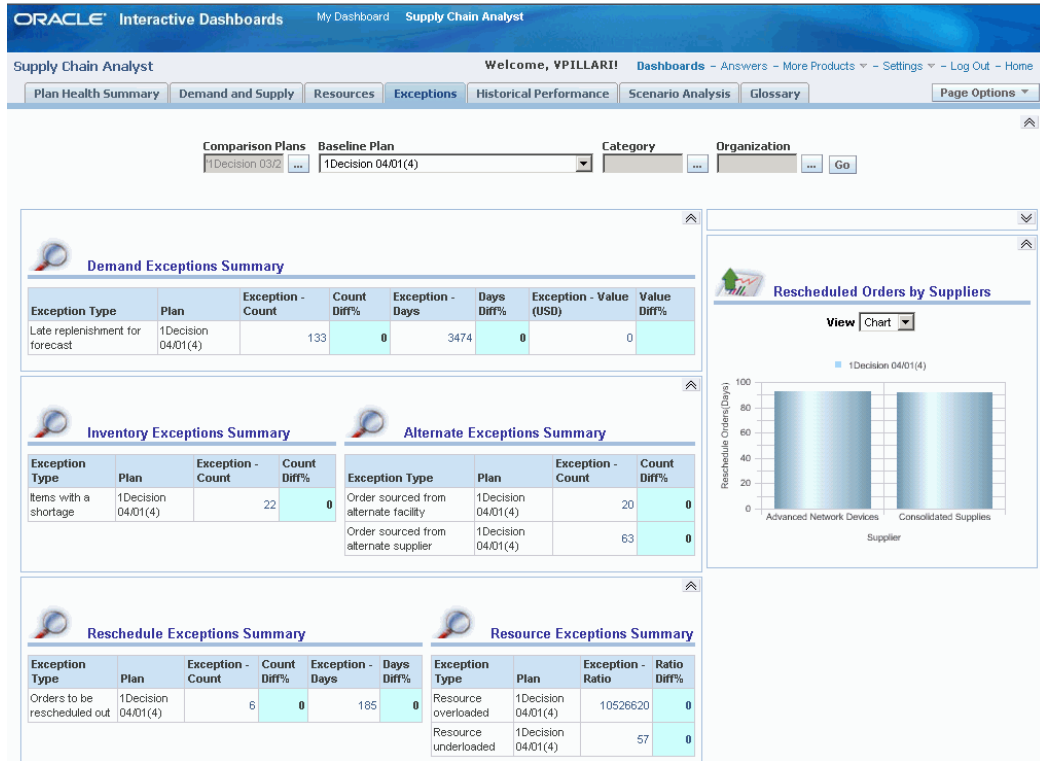
Using the Exceptions Page

This section provides an overview of the Exceptions page and discusses:

- Page-Level Filters.
- Exceptions Summary.
- Exceptions Summary by Category.
- Exceptions Summary by Organization.
- Rescheduled Orders by Suppliers.
- Rapid Planning Exceptions Report drill-downs.

Understanding the Exceptions Page

The Exceptions page enables the supply chain analyst to analyze exceptions in a current plan and compare those exceptions against a comparison plan.



Page-Level Filters

Page-level filters are provided at the top of the page to filter the results of all reports.

This table lists the page-level filters for the Exceptions page:

Filter	Description
Comparison Plans	Select from a list of comparison plans. Multiple plans can be selected. This is a required field.
Baseline Plan	Select from a list of plans to use as a baseline. Only one plan can be selected. This is a required field.
Category	Select from a list of categories. Multiple organizations can be selected. This is an optional field.

Filter	Description
Organization	Select from a list of organizations. Multiple organizations can be selected. This is an optional field.
Period Start	Select from a list of date and time selections. Select from a range of dates and times. This is an optional field.

Exceptions Summary

The Exceptions Summary reports enable the user to analyze exceptions in the baseline plan and compare exceptions between the baseline and comparison plans. The Exceptions Summary report consists of seven subreports:

- Item Exceptions Summary.
- Resource Exceptions Summary.
- Demand Exceptions Summary.
- Inventory Exceptions Summary.
- Alternate Exceptions Summary.
- Reschedule Exceptions Summary.
- Resource Exceptions Summary.

To view the Exceptions Summary reports, see *Understanding the Exceptions Page*, page 5-81.

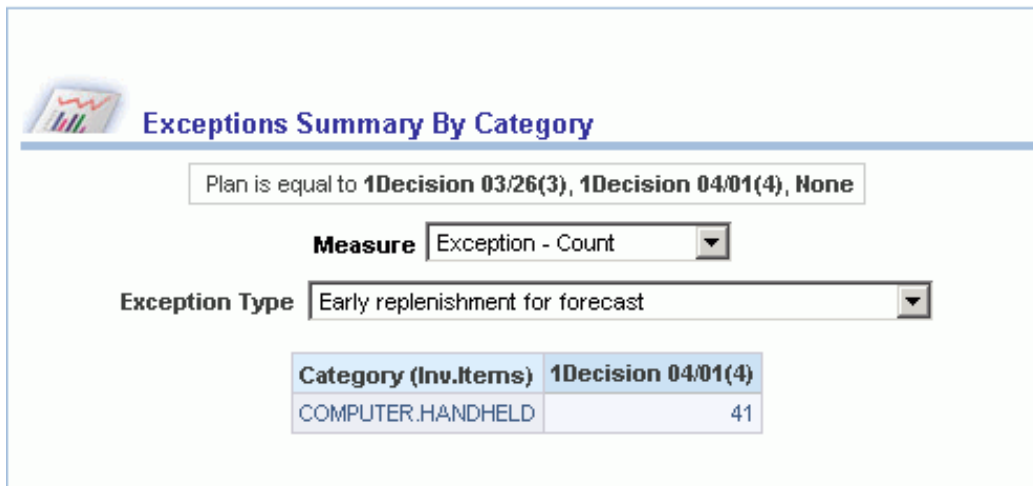
Additional reports that you can access from the Exceptions Summary reports are (listed in alphabetical order):

- Exceptions by Categories.
- Exceptions by Customers.
- Exceptions by Items.
- Exceptions by Organizations.
- Exceptions by Suppliers.

- Exceptions Trend.
- Resource Utilization by Organization.

Exceptions Summary by Category

The Exceptions Summary by Category report enables the user to analyze exceptions based on an item category in the baseline plan and also compare exceptions between the baseline and comparison plans for an item category.



Exceptions Summary By Category

Plan is equal to **1Decision 03/26(3), 1Decision 04/01(4), None**

Measure Exception - Count

Exception Type Early replenishment for forecast

Category (Inv.Items)	1Decision 04/01(4)
COMPUTER.HANDHELD	41

In addition to the page-level filters at the top of the page, users can specify these filters for the report:

Field	Description
Measure	Select how you want to view the exception measure. Options include Exception – Days , Exception – Quantity , Exception – Ratio , Exception – Value , Exception – Count .
Exception Type	Select an exception type. Options include Early replenishment for forecast , Items with a shortage , and so on.

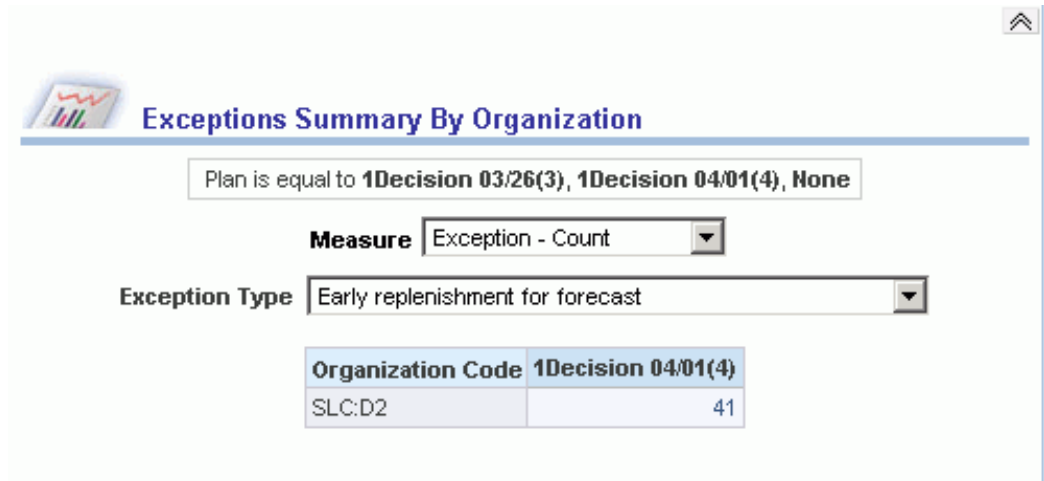
Additional reports that you can access from the Exceptions Summary by Category report are (listed in alphabetical order):

- Aggregate Horizontal Plan.
- Detailed Horizontal Plan.

- Exceptions Trend.

Exceptions Summary by Organization

The Exceptions Summary by Organization report enables the user to analyze exceptions based on an organization in the baseline plan and also compare exceptions between the baseline and comparison plans.



Plan is equal to 1Decision 03/26(3), 1Decision 04/01(4), None

Measure

Exception Type

Organization Code	1Decision 04/01(4)
SLC:D2	41

In addition to the page level-filters at the top of the page, users can specify these filters for the report:

Field	Description
Measure	Select how you want to view the exception measure. Options include Exception – Days , Exception – Quantity , Exception – Ratio , Exception – Value , Exception – Count .
Exception Type	Select an exception type. Options include Early replenishment for forecast , Items with a shortage , and so on.

Additional reports that you can access from the Exceptions Summary by Organization report are (listed in alphabetical order):

- Aggregate Horizontal Plan.
- Detailed Horizontal Plan.
- Exceptions Trend.

Rescheduled Orders by Suppliers

The Rescheduled Orders by Suppliers report enables the user to analyze the number of rescheduled orders by days for suppliers.

By default the report displays the top 10 suppliers. Using the MSC: Value of N for all top/bottom-N reports in Dashboards profile, users can adjust the number of top suppliers displayed.

To view the Rescheduled Orders by Suppliers report, see Understanding the Exceptions Page, page 5-81.

In addition to the page-level filters at the top of the page, users can specify this filter for the report:

Field	Description
View	Select how you want to view the report. Options include Chart and Table . The Chart view plots rescheduled orders in days for suppliers using a bar graph. The Table view provides the values that correspond to the Chart view.

An additional report that you can access from the Rescheduled Orders by Suppliers report is the Exceptions Trend report.

Rapid Planning Exception Report Drill Downs

The Exceptions Report in Rapid Planning is accessible from the following APCC reports:

- Exceptions Trend
- Exceptions Type by Category
- Exceptions Type by Supplier
- Exceptions Type by Customer
- Exceptions Type by Organization
- Exceptions Type by Item
- Exceptions Summary by Category

- Exceptions Summary by Organization
- Shipments to Plan by Category
- Shipments to Plan by Organization
- Production to Plan by Category
- Production to Plan by Organization
- Inventory Value by Category
- Inventory Value by Organization

The context that needs to be passed to Rapid Planning is one of the following:

- Plan, Exception Type
- Plan, Exception Type, Resource
- Plan, Exception Type, Item
- Plan, Exception Type, Organization
- Plan, Exception Type, Organization, Item

For details on each report, refer to the Supply Chain Analyst Dashboard section of this document

Note: These drill-downs are also applicable to ASCP Plans in the SCA dashboard in which case it the drilldown is to the ASCP workbench.

Using the Historical Performance Page

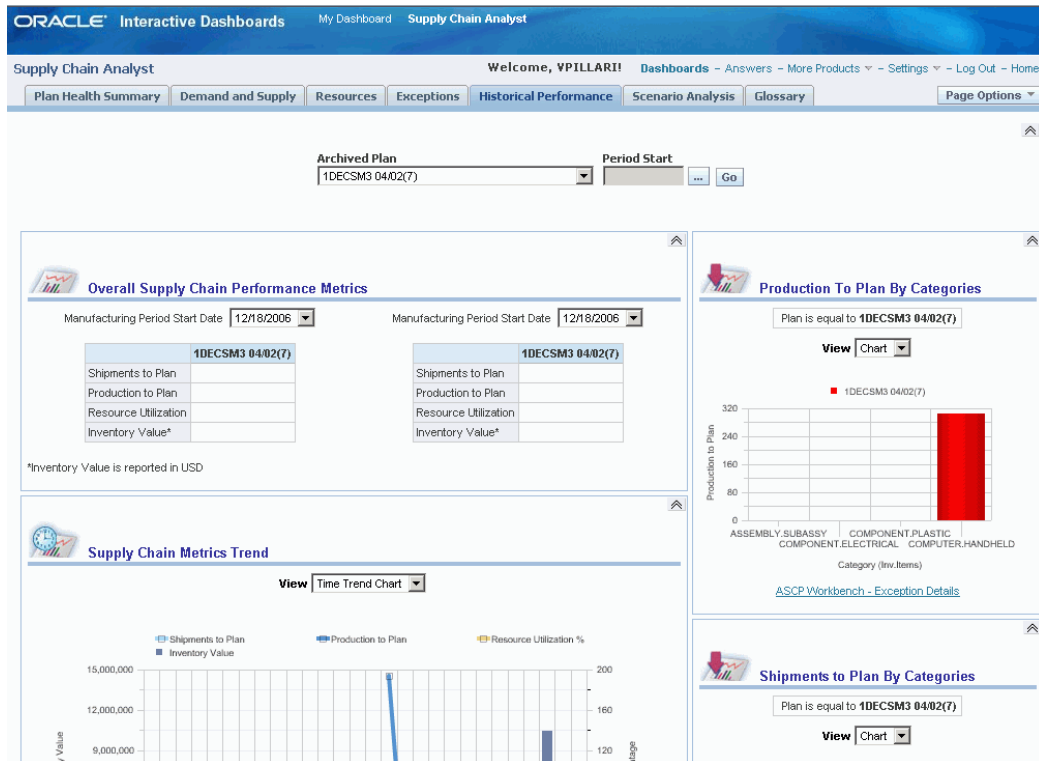
This section provides an overview of the Historical Performance page and discusses:

- Page-Level Filters.
- Overall Supply Chain Performance Metrics.
- Supply Chain Metrics Trend.
- Inventory Value by Categories.
- Days of Cover by Categories.
- Production to Plan by Categories.

- Shipments to Plan by Categories.
- Resource Utilization by Resource Groups.

Understanding the Historical Performance Page

The Historical Performance page enables the supply chain analyst to analyze the performance of the supply chain from one period to another. The user can compare the historical performance of a baseline plan to plans from previous periods.



Page-Level Filters

Page-level filters are provided at the top of the page to filter the results of all reports.

This table lists the page-level filters for the Historical Performance page:

Filter	Description
Archived Plan	Select from a list of archived plans. Only one plan can be selected.

Filter	Description
Period Start	Select from a list of date and time selections. A range of date and time can be selected.

Overall Supply Chain Performance Metrics

The Overall Supply Chain Performance Metrics report enables users to analyze performance metrics in one manufacturing period or two manufacturing periods.

To view the Overall Supply chain Performance Metrics report, see Understanding the Historical Performance Page, page 5-88

In addition to the page-level filters at the top of the page, users can specify this filter for the report:

Field	Description
Manufacturing Period Start Date	Select a date to analyze or compare.

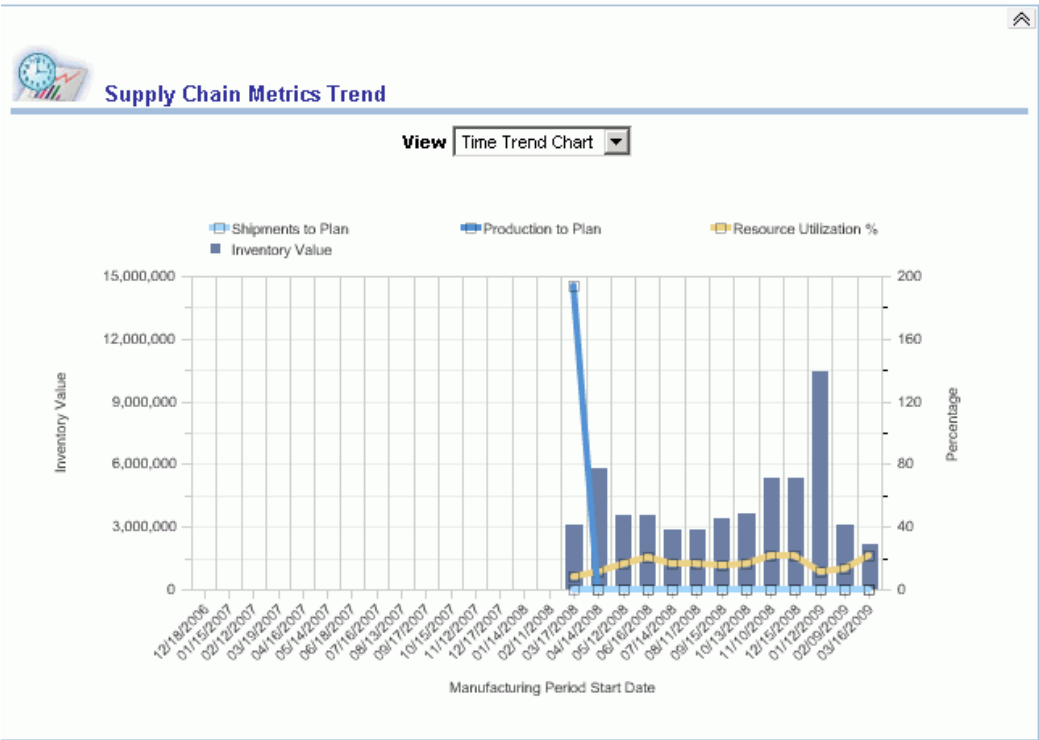
Additional reports that you can access from the Overall Supply Chain Performance Metrics report are (in alphabetical order):

- Exceptions Summary.
- Inventory Value by Category.
- Inventory Value by Organization.
- Least Utilized Resources.
- Most Utilized Resources.
- Production to Plan by Category.
- Production to Plan by Organization.
- Resource Utilization by Resource Group.
- Shipments to Plan by Category.
- Shipments to Plan by Organization.
- Total Demand by Customers.

Supply Chain Metrics Trend

The Supply Chain Metrics Trend report enables users to analyze the trends of key supply chain metrics and how these metrics are expected to perform in the future given a specific plan.

The report indicates how each supply chain metric has been performing against a plan value in the past and in the future. The report displays any metric that has a significant deviation between periods.



In addition to the page-level filters at the top of the page, users can specify this filter for the report:

Field	Description
View	<p>Select how you want to view the report. Options include Time Trend Chart and Time Trend Table.</p> <p>The Chart view plots inventory value, resource utilization, planned shipments, and planned production in a combination of line graphs and bar charts over time. The Table view provides the values that correspond to the Chart view.</p>

Additional reports that you can access from the Supply Chain Metrics Trend report are (in alphabetical order):

- Days of Cover by Items.
- Exception Summary.
- Resource Utilization by Organizations.
- Resource Utilization by Resource Groups.
- Total Demand by Customers.
- Total Supply by Categories.

Inventory Value by Categories

The Inventory Value by Categories report enables users to analyze inventory performance in the baseline plan. Inventory performance is displayed in terms of projected available balance at the end of a period as a monetary value.

By default, the report displays the top 10 categories with the most inventory. Using the MSC: Value of N for all top/bottom-N reports in Dashboards profile, the user can adjust the number of top categories displayed.



In addition to the page-level filters at the top of the page, users can specify this filter for the report:

Field	Description
View	<p>Select how you want to view the report. Options include Chart and Table.</p> <p>The Chart view plots inventory value for each category using a bar graph. The Table view provides the values that correspond to the Chart view.</p>

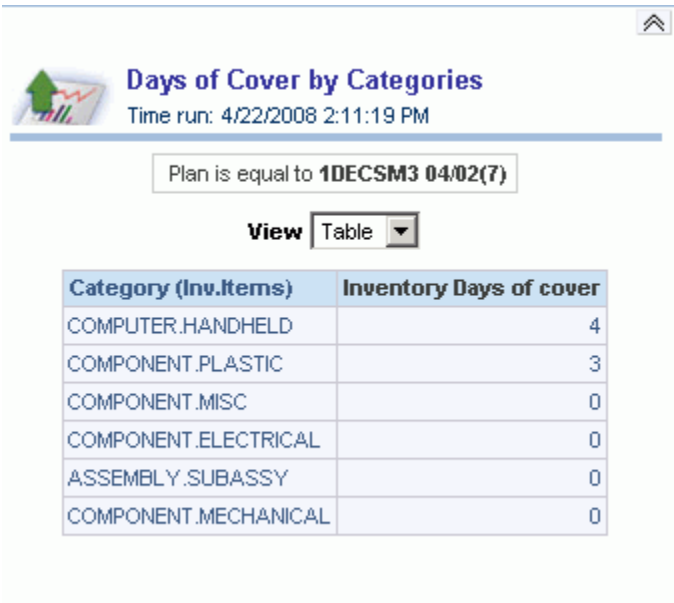
Additional reports that you can access from the Inventory Value by Categories report are (in alphabetical order):

- Exceptions Summary by Categories.
- Total Demand by Customers.
- Total Supply by Category.

Days of Cover by Categories

The Days of Cover by Categories report enables users to analyze inventory performance in the baseline plan. Inventory performance is displayed in terms of projected available balance at the end of a period as days of cover.

By default, the report displays the top 10 categories. Using the MSC: Value of N for all top/bottom-N reports in Dashboards profile, the user can adjust the number of top categories displayed.



In addition to the page-level filters at the top of the page, users can specify this filter for the report:

Field	Description
View	<p>Select how you want to view the report. Options include Chart and Table.</p> <p>The Chart view plots inventory days of cover for each category using a bar graph. The Table view provides the values that correspond to the Chart view.</p>

Additional reports that you can access from the Days of Cover by Categories report are (in alphabetical order):

- Top Categories by Exceptions.
- Top Items with Most Days of Cover.
- Top Organizations by Most Days of Cover.

Production to Plan by Categories

The Production to Plan by Categories report enables users to analyze the planned production for each category for a specific plan.

By default, the report displays the bottom 10 categories with lowest production to plan. Using the MSC: Value of N for all top/bottom-N reports in Dashboards profile, the user can adjust the number of categories displayed.

To view the Production to Plan by Categories report, see Understanding the Historical Performance Page, page 5-88

In addition to the page-level filters at the top of the page, users can specify this filter for the report:

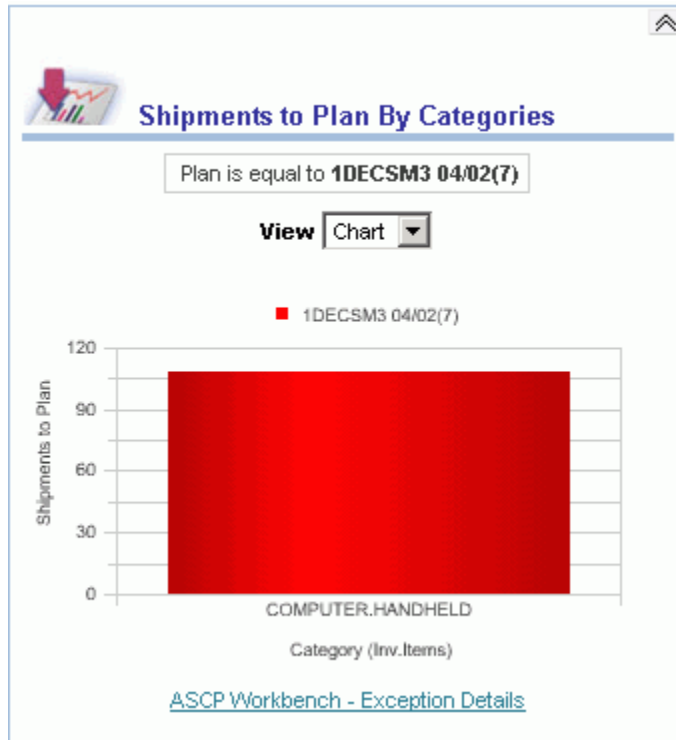
Field	Description
View	Select how you want to view the report. Options include Chart and Table . The Chart view plots planned production for each category using a bar graph. The Table view provides the values that correspond to the Chart view.

An additional report that you can access from the Production to Plan by Categories report is the ASCP Workbench – Exception Details report.

Shipments to Plan by Categories

The Shipments to Plan by Categories report enables users to analyze the planned shipments for each category for a specific plan.

By default the report displays the bottom 10 categories with lowest shipments to plan. Using the MSC: Value of N for all top/bottom-N reports in Dashboards profile, the user can adjust the number of categories displayed.



In addition to the page-level filters at the top of the page, users can specify this filter for the report:

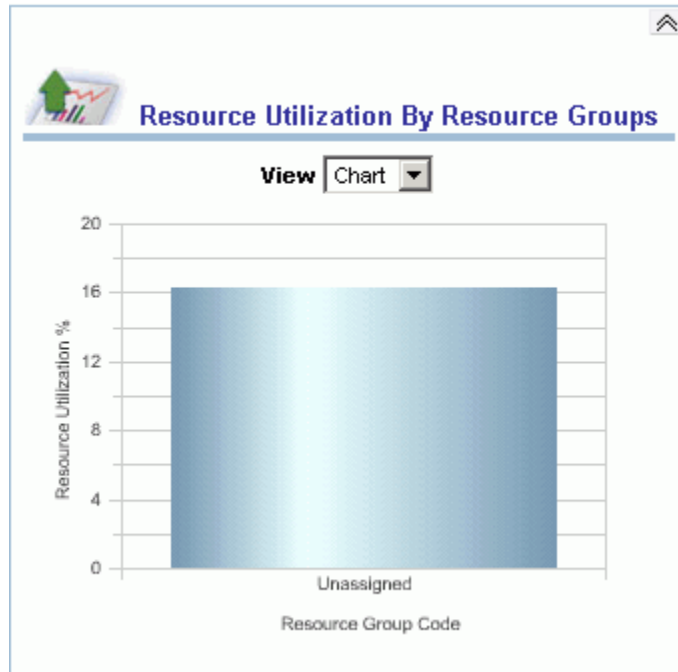
Field	Description
View	<p>Select how you want to view the report. Options include: Chart and Table.</p> <p>The Chart view plots planned shipments for each category using a bar graph. The Table view provides the values that correspond to the Chart view.</p>

An additional report that you can access from the Shipments to Plan by Categories report is the ASCP Workbench – Exception Details report.

Resource Utilization by Resource Groups

The Resource Utilization by Resource Groups report enables users to analyze resource utilization for the resource groups within a plan.

By default, the report displays the top 10 resource groups. Using the MSC: Value of N for all top/bottom-N reports in Dashboards profile, the user can adjust the number of resource groups displayed.



In addition to the page-level filters at the top of the page, users can specify this filter for the report:

Field	Description
View	<p>Select how you want to view the report. Options include Chart and Table.</p> <p>The Chart view plots resource utilization for each resource group using a bar graph. The Table view provides the values that correspond to the Chart view.</p>

An additional report that you can access from the Resource Utilization by Resource Groups report is the Resource Utilization Trend report.

Using the Scenario Analysis Page

This section provides an overview of the Scenario Analysis page and discusses:

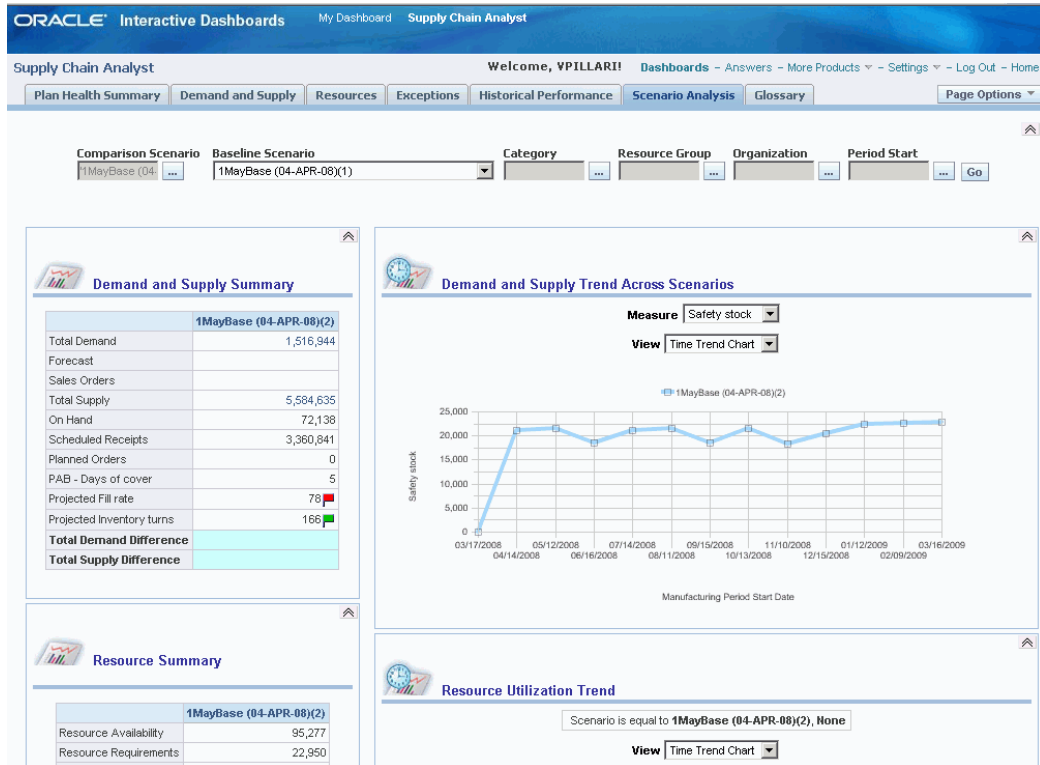
- Page-Level Filters.
- Scenario Summary Report
- Demand Pegging - Baseline Plan Report

- Left to Book by Quarter Report
- Plans Report
- Demand and Supply Summary Report
- Demand and Supply Trend Across Scenarios Report
- Resource Summary Report
- Resource Utilization Trend Report
- Exception Summary Report

Understanding the Scenario Analysis Page

The Scenario Analysis page enables the supply chain analyst to analyze key metrics in the supply chain over time and how they vary from one scenario to another. The key metrics that are displayed are:

- Demand and Supply.
- Resources.
- Exceptions.



Page-Level Filters

Page-level filters are provided at the top of the page to filter the results of all reports.

This table lists the page-level filters for the Scenario Analysis page:

Filter	Description
Comparison Scenario	Select from a list of plans that are to be used to compare to the baseline plan. Multiple plans can be selected. This is a required field.
Baseline Plan	Select from a list of plans that are to be used as the baseline plan. Only one plan can be selected. This is a required field.
Category	Select from a list of categories. Multiple categories can be selected. This is an optional field.

Resource Group	<p>Select from a list of resource groups. Multiple resource groups can be selected.</p> <p>This filter applies only to the resource- related reports on the page such as Resource Measures, Resource Trend Over Time, and Resource Exceptions Summary. This is an optional field.</p>
Organization	<p>Select from a list of organizations. Multiple organizations can be selected. This is an optional field</p>
Period Start	<p>Select from a list of date and time selections. A range of dates and times can be selected. This is an optional field.</p>

Scenario Summary Report

The Scenario Summary report is similar to the Executive Summary report on the SOP Dashboard. It contains a summary of the demand and supply metrics for the scenario, including:

- Scenario Summary
- Manufacturing Period Start Date
- Measures
- Shipment History (units)
- Consensus Forecast (units)
- Sales Orders (qty)
- Constrained Forecast (units)
- Constrained Forecast Value in Reporting Currency
- Consensus Forecast Value in Reporting Currency
- Shipment History Value in Reporting Currency
- Actual Backlog Value in Reporting Currency
- Current Shipment Plan – Derived – Formula to add Shipment History Value and

Sales Order Value

- Difference – Consensus Forecast and Shipment Plan – Derived – Formula to subtract Current Shipment Plan from Consensus Forecast Value
- Projected Demand Fill %
- Operating Plan Value in Reporting Currency
- Financial Forecast Value in Reporting Currency
- Difference % - Operating Plan and Financial Forecast – Derived – Formula to ratio Financial Plan minus Financial Forecast

Filters

Filter set for prompts for Scenario Analysis page include both the prompted comparison Scenarios and the Baseline Scenario Presentation variable SCABScenarioPV.

From the Scenario Summary Report, you can drill down to the numerous reports using the default filtering from the analysis dashboard page level prompts. At the same time, you can enable interactive changing of the prompts to further filter down the selection or expand the selection.

The table below shows the drilldown reports you can access from the Scenario Summary report and the field values from which you drill down.

From Field Value	Drilldown Report
Constrained Forecast Value	Demand Pegging - Units
	Demand Pegging - Value
Shipment History Value	Bookings Performance - Units
	Bookings Performance - Value
	Shipment Performance - Units
	Shipment Performance - Value
Actual Backlog Value	Backlog Analysis – Units
	Backlog Analysis – Value
Sales Order Value	Sales Order Analysis - Units
	Sales Order Analysis - Value

Demand Pegging - Units Report

The Demand Pegging - Units report is viewed by drilling down from the Constrained Forecast Value field in the Scenario Summary Report. It provides information about the following:

- Scenario
- Organization
- Category description
- Manufacturing week start

The following measures are available from the Demand Pegging – Units report:

- Demand Pegged to Onhand (qty)
- Demand Pegged to Scheduled Receipts (qty)
- Demand Pegged to Planned Orders (qty)

Filters

The filters are the Supply Chain Analyst (SCA) Scenario prompts.

Views

The views are:

- Title
- Chart - Stacked bar of metrics by week
- Pivot table

You can view the Pivot table by the following criteria:

- Organization, Category, Measure Labels as Rows
- Week as column
- Demand Pegged to Onhand, Demand Pegged to Scheduled Receipts, Demand Pegged to Planned Orders as measures

Demand Pegging - Value Report

The Demand Pegging - Value report is viewed by drilling down from Constrained Forecast Value field in the Scenario Summary Report. It provides information about the following:

- Scenario
- Organization
- Category description
- Manufacturing week start

The following measure are available from the Demand Pegging - Value report:

- Demand Pegged to Onhand – Value in Reporting Currency
- Demand Pegged to Scheduled Receipts – Value in Reporting Currency
- Demand Pegged to Planned Orders – Value in Reporting Currency

Filters

The filters are the SCA Scenario prompts.

Views

- Title
- Chart – Stacked bar of metrics by week
- Pivot table

The Pivot table is viewed by the following criteria:

- Organization, Category, Measure Labels as Rows
- Week as column with totals
- Demand Pegged to Onhand – Value in Reporting Currency, Demand Pegged to Scheduled Receipts – Value in Reporting Currency, Demand Pegged to Planned Orders – Value in Reporting Currency as measures.

Bookings Performance – Units Report

The Bookings Performance – Units report is view by drilling down from the Shipment History – Value field of the Scenario Summary report. It provides information about the following:

- Scenario

- Manufacturing Week Start Date
- Category Description

The following measures are available from the Booking Performance - Units report:

- Bookings Forecast (units)
- Bookings History (units)
- Filters

Filters

The filter is set from the SCA dashboard, Scenario Analysis.

Views

The views are:

- Title
- Column Selector – Choose View By from Category, Organization, Customer, Zone
- Chart – Line Bar Combo – Bookings Forecast as Line and Bookings History by week as Bar
- Pivot Table

The Pivot table is viewed by the following criteria:

- Category and Measure Labels as Rows
- Week as Column with Totals
- Bookings Forecast (units) and Bookings History (units) as measures

Bookings Performance – Value Report

The Bookings Performance – Value report is view by drilling down from the Shipment History – Value field of the Scenario Summary report. It provides information about the following:

- Scenario
- Manufacturing week start date
- Category description

The following measures are available from the Booking Performance - Units report:

- Bookings Forecast – Value Reporting Currency

- Bookings History Value Reporting Currency Filters

Filters

The filter is set from the SCA dashboard, Scenario Analysis.

Views

The views are:

- Title
- Column Selector – Choose View By from Category, Organization, Customer, Zone
- Chart-Line Bar Combo. Bookings Forecast as Line and Bookings History by week as a bar. The bar and line Axis are synchronized.
- Pivot table

The Pivot table is viewed by the following criteria:

- Category and Measure Labels as Rows
- Week as Column with Totals
- Bookings Forecast (units) and Bookings History (units) as measures

Shipment Performance - Units Report

The Shipment Performance - Units report is viewed by drilling down from the Shipment History Value field in the Scenario Summary Report. It provides information about the following:

- Scenario
- Category description
- Manufacturing week start

The following measures are available from the Shipment Performance – Units report:

- Shipment Forecast (units)
- Shipment History (units)

Filters

The filters are set from the SCA dashboard, Scenario Analysis.

Views

The views are:

- Title
- Column Selector – Choose View By from Category, Organization, Customer, Zone
- Chart – Line Bar Combo – Shipment Forecast as Line and Shipment History by week as Bar. The Bar and Line axis are synchronized.
- Pivot table

The Pivot table is viewed by the following criteria:

- Category and Measure Labels as Rows
- Week as Column with Totals
- Shipment Forecast (units) and Shipment History (units) as measures

Shipment Performance – Value Report

The Shipment Performance - Value report is viewed by drilling down from the Shipment History Value field in the Scenario Summary Report. It provides information about the following:

- Scenario
- Category description
- Manufacturing week start

The following measures are available from the Shipment Performance – Value report:

- Shipment Forecast Value in Reporting Currency
- Shipment History Value in Reporting Currency

Filters

Filters are set from the SCA dashboard, Scenario Analysis.

Views

The views are:

- Title
- Column Selector – Choose View By from Category, Organization, Customer, Zone
- Chart – Line Bar Combo – Shipment Forecast Value in Reporting Currency as Line and Shipment History Value in Reporting Currency by week as Bar. The Bar and Line axis are synchronized.

- Pivot table

The Pivot table is viewed by the following criteria:

- Category and Measure Labels as Rows
- Week as Column with Totals
- Shipment Forecast Value in Reporting Currency and Shipment History Value in Reporting Currency as measures

Backlog Analysis - Units Report

The Backlog Analysis - Units report is viewed by drilling down from the Backlog Value field in the Scenario Summary Report. . It provides information about the following

- Scenario
- Category description
- Manufacturing week start

The Actual Backlog measure is available from the Shipment Performance – Value report.

Filters

The filters are set from the SCA dashboard, Scenario Analysis.

Views

The views are:

- Title
- Column Selector – choose View By from Category, Organization, Customer, Zone
- Chart – Stacked Bar Chart - Actual Backlog by Category by Week
- Pivot table

The Pivot table is viewed by the following criteria:

- Category and Measure Labels as Rows
- Week as Column with Totals
- Actual Backlog (units) as Measure

Backlog Analysis – Value Report

The Backlog Analysis – Value report is viewed by drilling down from the Backlog Value

field in the Scenario Summary Report. It provides information about the following:

- Scenario
- Category description
- Manufacturing week start

The Actual Backlog - Value Reporting Currency measure is available from the Shipment Performance – Value report.

Filters

Filter are set from the SCA dashboard, Scenario Analysis.

Views

The views are:

- Title
- Column Selector – choose View By from Category, Organization, Customer, Zone
- Chart – Stacked Bar – Backlog by Category by Week
- Pivot table

The Pivot table is viewed by the following criteria:

- Category and Measure Labels as Rows
- Week as Column with Totals
- Actual Backlog – Value Reporting Currency as measure

Sales Order Analysis – Units

The Sales Order Analysis – Units report is viewed by drilling down from Sales Order Value field in the Scenario Summary Report. It provides information about the following:

- Scenario
- Category description
- Manufacturing week start

The following measures are available from the Sales Order Analysis - Units report:

- Sales Order – Scheduled Date (qty)
- Sales Order – Requested Date (qty)

- Sales Order – Promised Date (qty)

Filters

The filters are set from the SCA dashboard, Scenario Analysis.

Views

The views are:

- Title
- Sales Order – Scheduled Date (qty) Sales Order – Requested Date (qty) Sales Order – Promised Date (qty)
- Chart – Stacked Bar – Sales Orders by Category by week as Bar
- Pivot table

The Pivot table is viewed by the following criteria:

- Category and Measure Labels as Rows
- Week as Column with Totals
- Sales Orders – Scheduled Date (qty), Sales Orders, Request Date, Sales Orders – Promise Date as measures

Sales Order Analysis – Value Report

The Sales Order Analysis – Value report is viewed by drilling down from Sales Order Value field in the Scenario Summary Report. It provides information about the following:

- Scenario
- Category description
- Manufacturing week start

The following measures are available from the Sales Order Analysis - Units report:

- Sales Order – Scheduled Date - Value in reporting currency
- Sales Order – Requested Date - Value in reporting currency
- Sales Order – Promised Date - Value in reporting currency

Filters

Filters are set from the SCA dashboard, Scenario Analysis.

Views

The views are:

- Title
- Column Selector – Choose View By from Category, Organization, Customer, Zone
- Chart – Stacked Bar – Sales Order Value by Category by week as Bar
- Pivot table

The Pivot table is viewed by the following criteria:

- Category and Measure Labels as Rows
- Week as Column with Totals
- Sales Orders - Scheduled Date - Value in Reporting Currency, Sales Orders - Request Date - Value in Reporting Currency, Sales Orders - Promise Date - Value in Reporting Currency as measures

Current Shipment Plan Report

The current shipment plan measure combines period to date shipment history and sales orders (backlog) scheduled to ship in the period. It expresses how much of the forecast or revenue target is already covered by booked orders that may or may not have yet shipped. A comparison of this measure to the forecast becomes how much is "left to book" to meet the forecast.

The Current Shipment Plan report is viewed by drilling down from the Current Shipment Plan in the Scenario Summary Report. It provides information about the following:

- Scenario
- Organization
- Category Description
- Manufacturing Week Start date

The following measures are available from the Current Shipment Plan report:

- Shipment History – value in Reporting Currency
- Sales Orders – Value in Reporting Currency
- Consensus Forecast – value in Reporting Currency
- Derived Measure – Current Shipment Plan – sum of Shipment History and Sales Orders

- Derived Measure – Difference – Forecast and Shipment Plan. Consensus forecast minus current shipment plan

Filters

The filters are the SCA Scenario Analysis prompts.

Views

The views are:

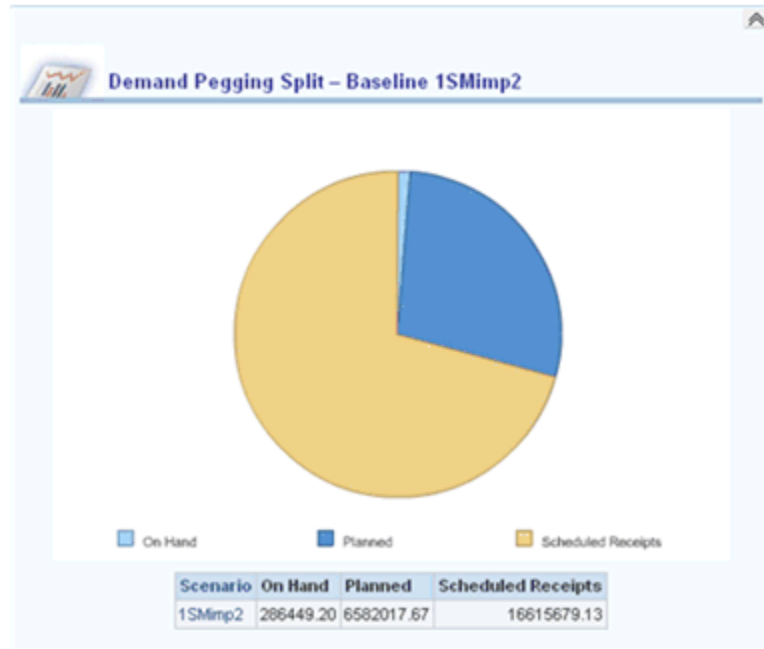
- Title
- Pivot table
- Organization, Category, Measure Labels as Rows
- Week as Column with Totals
- Shipment History Value, Sales Order Value, Current Shipment Plan, Consensus Forecast value, Difference Forecast and Shipment Plan, Cumulative Difference Forecast and Current Shipment Plan as measures

Demand Pegging – Baseline Plan Report

The Demand Pegging - Baseline Plan report provides information about the scenario.

- Demand Pegged to On Hand – Value in Reporting Currency
- Demand Pegged to Scheduled Receipts – Value in Reporting Currency
- Demand Pegged to Planned Orders – Value in Reporting Currency

An example of the Demand Pegging - Baseline Plan report is shown below:



Filters

The filters are the SCA Scenario prompts that are adjusted to select the Baseline Scenario.

Views

The views are:

- Title: Customer Title with Presentation Variable for Baseline Scenario and Demand Utilization Split – Baseline @{{SCABScenarioPV}}

The screenshot shows the "Prompts" tab of the SCA Scenario configuration window. The "Title" field is set to "ry Split – Baseline @{{SCABScenarioPV}}". The "Logo" field is set to "fmap.images:report_generic.jpg". The "Subtitle" field is empty. The "Started Time" dropdown is set to "Do not display". The "Help URL" field is empty. The "Display Results" checkbox is checked. The "Demand Pegging Split – Baseline @{{SCABScenarioPV}}"

- Chart, pie chart of measures

- Table

Left to Book by Quarter Report

The Left to Book by Quarter report provides information about the following:

- Scenario Name - Baseline Scenario
- Fiscal Quarter Start Date

The following measures are available from the Left to Book by Quarter Report:

- Consensus by Forecast – Value in Reporting Currency
- Sales Orders – Value in Reporting Currency
- Shipment History – Value in Reporting Currency

Filters

The filters are SCA Scenario prompts, adjusted to prompted Baseline Scenario.

Views

The views are:

- Title: Custom title to insert presentation variable for baseline scenario
- Chart: combined line/bar chart
- Quarter as Axis
- Sales Order Value and Shipment History Value as stacked bar
- Consensus Forecast Value as Line
- Line and Bar axis synchronized

Plans Report

The Plans report provides information about:

- Scenario
- Plan
- Formula on column to provide link to ASCP or Rapid Planning

Filters

The filters capture prompted comparison scenarios and prompted baseline scenario.

Views

The views are:

- Title
- Table: a simple table of scenario and plan

Demand and Supply Summary Report

The Demand and Supply Summary report on the Scenario Analysis page is exactly like the Demand and Supply Summary report on the Demand and Supply page with one exception. The former enables the user to determine how demand and supply is different between a baseline and comparison scenario.

See Demand and Supply Summary, page 5-30

Demand and Supply Trend Across Scenarios Report

The Demand and Supply Trend Across Scenarios report on the Scenario Analysis page is similar to the Demand and Supply Trend Across Plans report on the Demand and Supply page with one exception. The former report enables the user to evaluate the trends of demand and supply over time and whether the trends change between the baseline and comparison scenarios.

See Demand and Supply Trend Across Plans, page 5-32

Navigations:

From Total Demand:

- Demand Pegging – Units
- Demand Pegging – Value

From Total Supply

- Supply Utilization – Units
- Supply Utilization – Value

Supply Utilization – Units Report

The Supply Utilization – Units report provides information about:

- Scenario
- Organization
- Category Description

- Manufacturing Week Start

The following measures are available from the Supply Utilization – Units report:

- Supply End Pegged to Sales Orders (qty)
- Supply End Pegged to Forecasts (qty)
- Supply End Pegged to Safety Stocks (qty)
- Supply End Pegged to Excess (qty)

Filters

The filters are the SCA Scenario prompts expressed as filters.

Views

The views are:

- Title
- Chart – stacked bar of metrics by week
- Pivot table

You can view the Pivot table by the following criteria:

- Organization, Category, Measure Labels as Rows
- Week as column with totals
- Supplies End Pegged to Sales Orders, Supplies End Pegged to Forecasts, Supplies End Pegged to Safety Stocks, Supplies End Pegged to Excess as measures

Supply Utilization – Value Report

The Supply Utilization – Value report provides information about the following:

- Scenario
- Organization
- Category Description
- Manufacturing week start

The following measures are available from the Supply Utilization – Value report:

- Supplies End Pegged to Sales orders – value in reporting currency
- Supplies End Pegged to Forecasts – value in reporting currency

- Supplies End Pegged to Safety Stocks – value in reporting currency
- Supplies End Pegged to Excess – value in reporting currency

Filters

The filters are the SCA Scenario prompts.

Views

The views are:

- Title
- Chart, stacked bar of metrics by week
- Pivot table

The Pivot table can be viewed by the following criteria:

- Organization, Category, Measure Labels as Rows
- Week as column with totals
- Supplies End Pegged to Forecasts – Value in Reporting Currency, Supplies End Pegged to Forecasts, Value in Reporting Currency, Supplies End Pegged to Safety Stocks – Value in Reporting Currency, Supplies End Pegged to Excess – Value in Reporting Currency as measures

Resource Summary Report

The Resource Summary report on the Scenario Analysis page is exactly like the Resource Summary report on the Resources page with one exception. The former enables the user to determine how resource utilization varies between baseline and comparison scenarios.

See Resource Summary , page 5-58

Resource Utilization Trend Report

The Resource Utilization Trend report on the Scenario Analysis page is exactly like the Resource Utilization Trend report on the Resources page with one exception. The former enables the user to determine how resources are used over time and whether the trend has changed between baseline and comparison scenarios.

See Resource Utilization Trend, page 5-61

Exception Summary

The Exception Summary report on the Scenario Analysis page is exactly like the

Exception Summary report on the Exceptions page with one exception. The former enables the user to analyze exceptions in the baseline scenario and compare exceptions between the baseline and comparison scenarios.

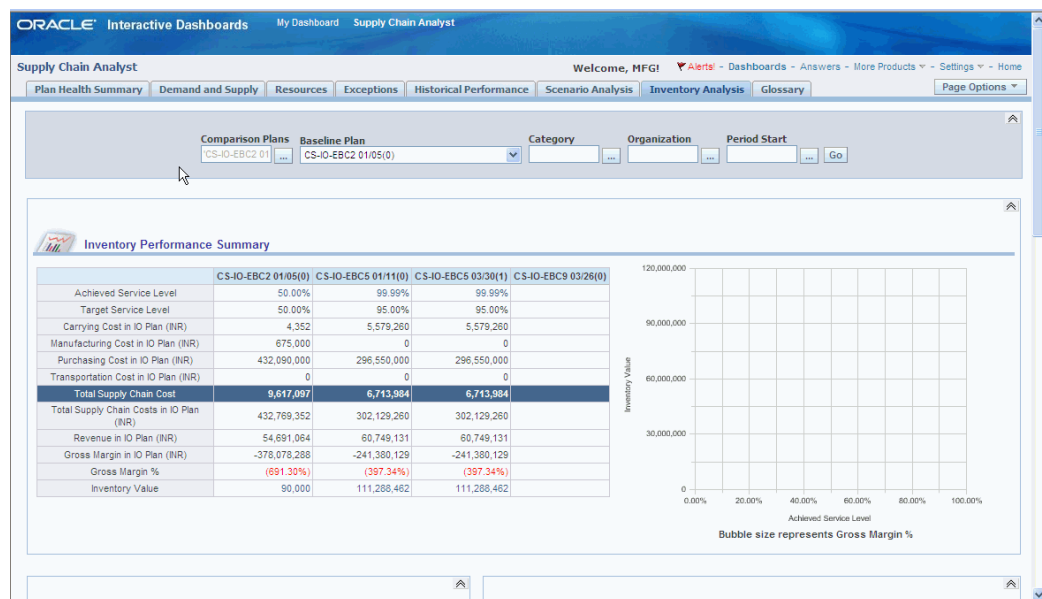
See Exceptions Summary, page 5-83

Using the Inventory Analysis Page

The Inventory Analysis page allows supply chain analysts to efficiently evaluate how inventory attributes and parameters vary from plan to plan and within a plan. You can make inventory decisions using APCC. All reports are provided in the reporting currency.

All reports are provided in the reporting currency.

An example of the top portion of the Inventory Analysis page is shown below. Additional reports are available by scrolling down the page.



Page-Level Filters

Page level filters are provided at the top of the page to filter the results of all reports.

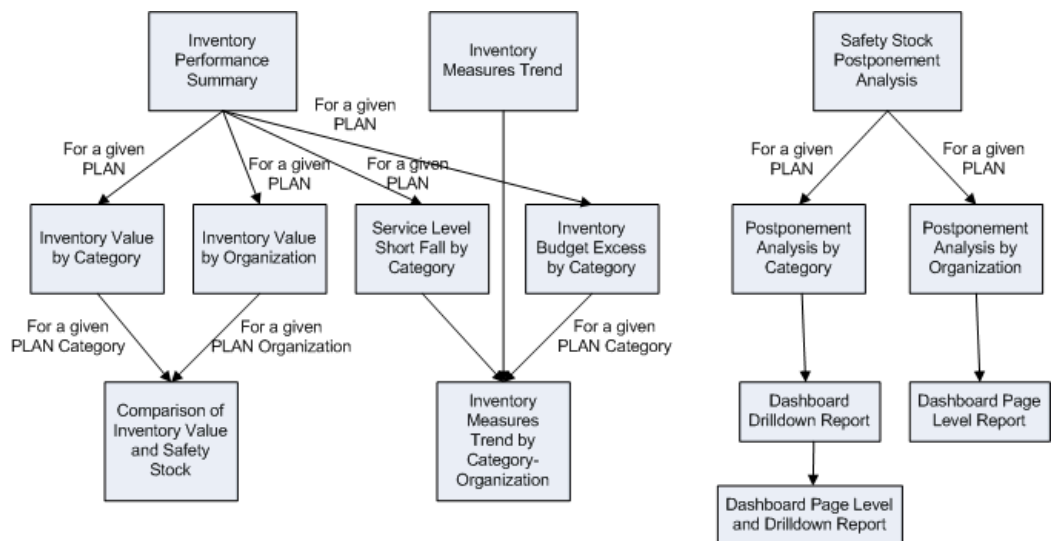
This table lists the page-level filters for the Inventory Analysis page.

Filter	Description
--------	-------------

Baseline Plan	Select from a list of plans that are to be used as the baseline plan. Only one plan can be selected. This is a required field.
Comparison Plan	Select from a list of plans that are to be used to compare to the baseline plan. You can select multiple plans from this list.
Category	Select from a list of categories. Multiple categories can be selected. This is an optional field.
Organization	Select for a list of organizations. Multiple organizations can be selected. This is an optional field.
Week Start	Select from the date range of choice over which the reports are displayed.

Inventory Analysis Page Reports

The following diagram shows the reports available in the Inventory Analysis Page and their relationship to each other.



Inventory Performance Summary Report

The inventory performance summary page helps users understand the investment required to achieve a given service level and the profit that is derived from it. The

following measures provide this information:

- Achieved service level
- Target service level
- Carrying costs
- Manufacturing cost
- Purchasing cost
- Transportation cost
- Total supply chain cost
- Revenue
- Gross margin
- Gross margin as a percentage
- Inventory value

You can view the Inventory Performance Summary report as a table, bubble graph, or chart.

From the Inventory Summary Report, you can drill down to the following reports:

- Inventory Value by Category
- Inventory Value by Organization
- Service Level Short Fall by Category
- Inventory Budget Excess by Category

Drilldown reports are sorted by Service level shortfall, but display all categories. The Difference in service levels is given as a percentage and calculated as:

{Target Service Level – Achieved Service Level}

The graph on the Inventory Analysis page is for the Baseline Plan and the report on the dashboard page is Top-N.

Inventory Measures Trend Report

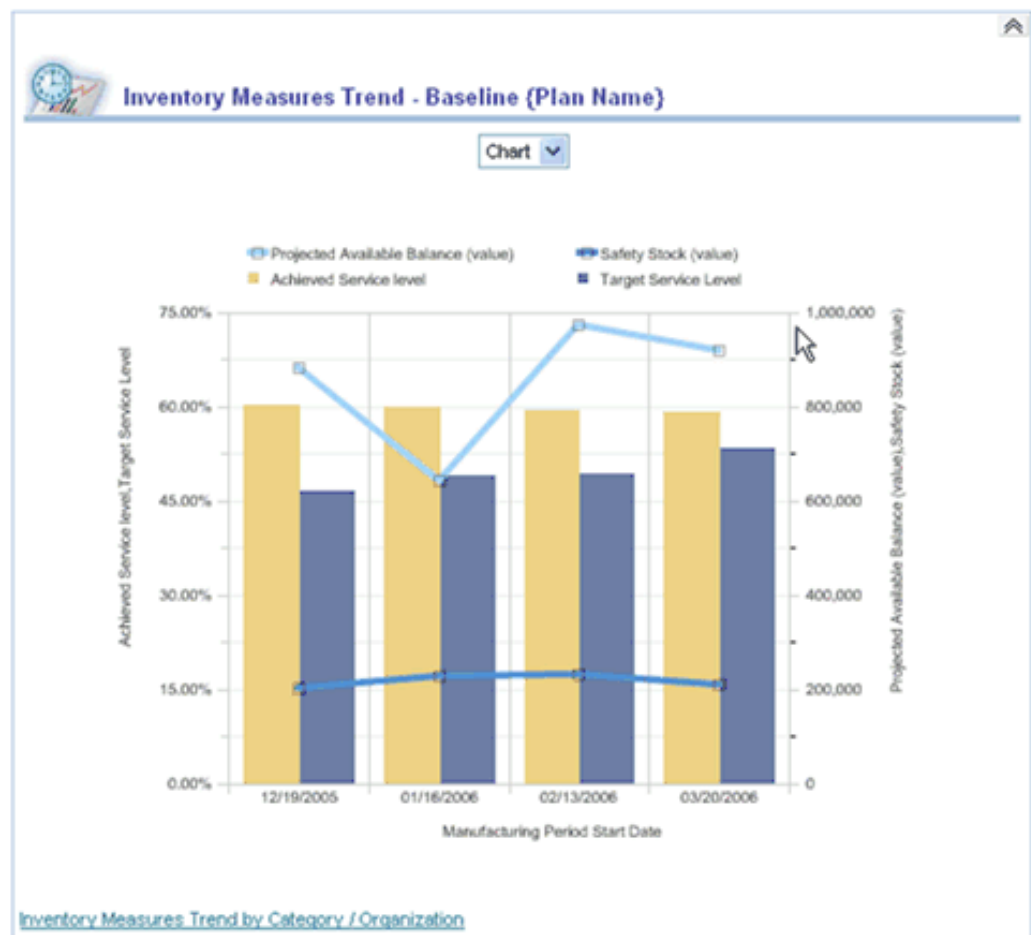
This report help analyze inventory performance using key measures of Safety Stock and Service Level. This helps users understand if achieved service level is tracking to target service level and if projected available balance is tracking to safety stock.

The report can be viewed as a table or a chart.

In generating the Inventory Measure Trend report, note the following:

- The report is generated for the Baseline Plan
- A link to the Inventory measures Trend by Category-Organization is available at the bottom of the report
- The report is available in Reporting currency
- Data is displayed in Manufacturing Periods.

An example of the Inventory measures Trend report is shown below:



Inventory Quantity (Value) by Category Report and Inventory Quantity (Value) by Organization Report

These two reports are drill downs from the Inventory Performance Summary report and provide inventory information for a given plan. From either one of these plans, you

can drill down to the Comparison of Inventory Quantity (Value) and Safety Stock.

If the drill down is from Inventory Quantity (Value) by Category report, then the resulting report is the Inventory Quantity and Safety Stock Comparison for the specific category across organizations.

If the drill down is from Inventory Quantity (Value) by Organization report, then the resulting report is the Inventory Quantity and Safety Stock Comparison for all categories in the specific organization.

Inventory Quantity (Value) as a drilldown report brings up both the Inventory Quantity (Value) by Category and Inventory Quantity (Value) by Organization reports. These are not Top-N reports.

Service Level Short Fall by Category Report

The Service Level Short Fall by Category report details the Top N categories that have the greatest difference between Achieved Service Level and Target Service Level for a given plan.

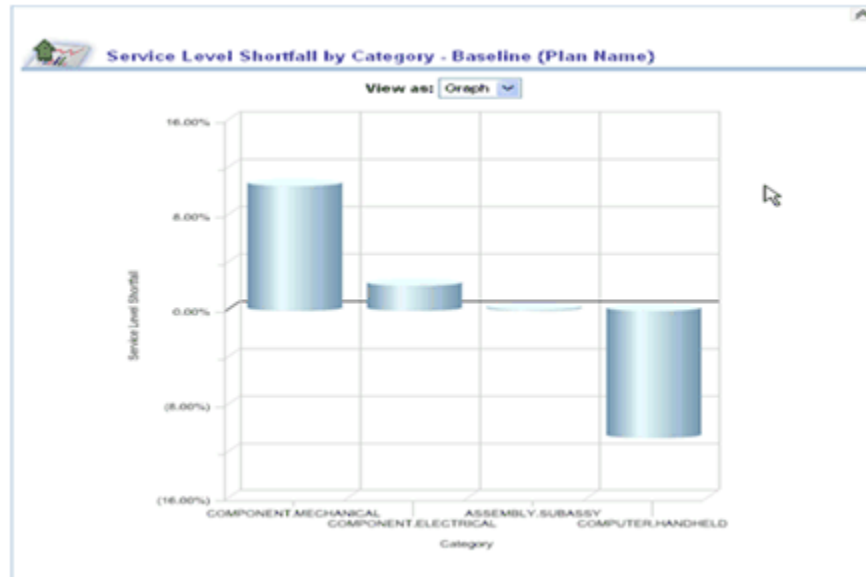
This report is a drill down from the Inventory Performance Summary report. It applies to a given plan. From this report, you can drill down to the Inventory Measures Trend by Category-Organization report, which displays information for a given plan or organization.

Some points to note when using this report are:

- The graph on the Inventory Analysis page is for the Baseline Plan.
- Only the report on the dashboard page is a Top-N report, if it a drilldown report, sort by Service Level Shortfall but display all categories.
- The Difference in Service Level as a percentage is computed as:

{Target Service Level – Achieved Service Level}

An example of a Service Level Shortfall by Category report is shown below:



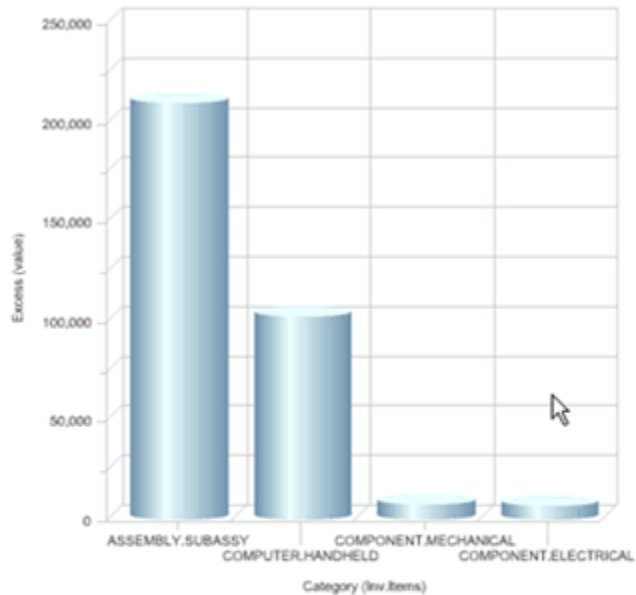
Inventory Budget Excess by Category Report

This report details the Top-N categories with the most difference between Budget and Inventory Value (Average Projected Available Balance (reporting currency) over the desired period). It helps business users understand which categories have either exceeded their budget or are way below their assigned budget values.

This report is a drill down from the Inventory Performance Summary report. An example of the report is shown below:



Categories with Inventory over Budget



000_sb_io 01:06(3)

Category (Inv.Items)	Projected Available Balance (value)	Inventory Budget	Excess (value)
ASSEMBLY.SUBASSY	237,454	27,659	209,796
COMPUTER.HANDHELD	166,491	64,367	102,124
COMPONENT.MECHANICAL	30,443	23,023	7,419
COMPONENT.ELECTRICAL	238,696	231,674	7,022

[Return - Create Bookmark Link](#)

Comparison of Inventory Quantity (Reporting Currency) and Safety Stock

This report, generated for selected categories and organizations, helps you compare inventory to safety stock in value, days of cover and quantity. The report also displays a Ratio, which is useful in determining if there is adequate inventory available to meet Safety Stock. The Ratio is sorted in ascending order.

Note: Safety Stock that is used in this table is the value of the first bucket.

This report is a drill down from the Inventory Quantity (Value) by Category and the Inventory Quantity (Value) by Organization reports. You can drill down from this report to the Item-Organization level by using the inherent hierarchy of the model.

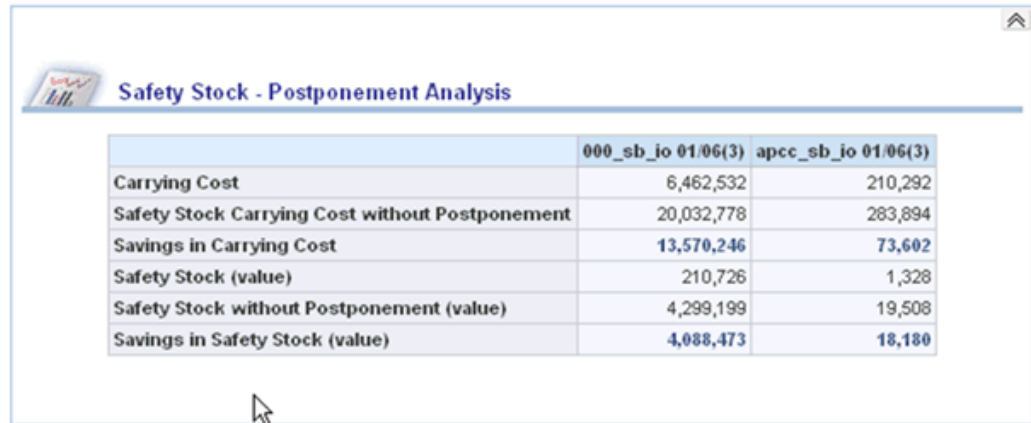
Safety Stock Postponement Analysis Report

This report details material positioning for across plans. It helps business users understand how much organizations have saved in terms of carrying cost and cost of

inventory in using postponement.

From this report, you can drill down to Safety Stock Postponement Analysis by Category report and the Safety Stock Postponement Analysis by Organization report.

An example of the Safety Stock Postponement Analysis report is shown below:



	000_sb_io 01/06(3)	apcc_sb_io 01/06(3)
Carrying Cost	6,462,532	210,292
Safety Stock Carrying Cost without Postponement	20,032,778	283,894
Savings in Carrying Cost	13,570,246	73,602
Safety Stock (value)	210,726	1,328
Safety Stock without Postponement (value)	4,299,199	19,508
Savings in Safety Stock (value)	4,088,473	18,180

Safety Stock Postponement Analysis by Organization Report

This report details material positioning for a given plan across organizations. It helps users understand how much organizations have saved in terms of carrying cost and cost of inventory in using postponement.

Savings is calculated as:

Measure without Postponement – Measure with Postponement

This report is a drill down from the Safety Stock Postponement Analysis report. There are no drill downs from this report.

Build Plan Report

The Build Plan report is part of Demand Fulfillment tab in the Supply Chain Analyst Dashboard. It uses the End Item Dimension to provide insight to planners. This report provides the ability to analyze measure by End Item, which shows the quantities for each component item across all end items.

Four measures covered in the report are:

- Total Supply
- Total Demand
- Total Demand Fulfilled
- Projected Available Balance

Plan	P1	End Items	FG1;FG2	Items		Orgs		Planner				
End Item	Item	Org	Measure	W1	W2	W3	W4	W5	W6	W7	W8	W9
FG1	FG1	M1	Total Supply	120	90	0	0	40	90	0	0	90
		M1	Total Demand	100	20	20	40	50	80	40	100	40
		M1	Total Demand Fulfilled	100	20	20	40	50	110	0	0	0
		M1	Projected Available Balance	20	90	70	30	20	30	-10	-110	-60
	C1	M1	Total Supply	440	40	40	40	40	40	40	40	40
		M1	Total Demand	80	80	80	80	120	120	100	40	40
		M1	Total Demand Fulfilled	80	80	80	80	120	120	100	40	40
		M1	Projected Available Balance	360	320	280	240	160	80	20	20	20
	C2	M1	Total Supply	30	30	30	30	30	30	130	300	200
		M1	Total Demand	10	20	30	80	140	120	90	40	30
		M1	Total Demand Fulfilled	10	20	50	0	0	0	0	240	200
		M1	Projected Available Balance	20	30	30	-20	-130	-240	-200	60	30
FG2	FG2	M1	Total Supply	100	0	0	0	100	0	0	100	0
		M1	Total Demand	20	20	20	20	20	20	20	20	20
		M1	Total Demand Fulfilled	20	20	20	20	20	20	20	20	20
		M1	Projected Available Balance	80	60	40	20	100	80	60	140	120
	C1	M1	Total Supply	440	40	40	40	40	40	40	40	40
		M1	Total Demand	80	80	80	80	120	120	100	40	40
		M1	Total Demand Fulfilled	80	80	80	80	120	120	100	40	40
		M1	Projected Available Balance	360	320	280	240	160	80	20	20	20

Order Details Report

As part of your analysis, you can display contextual Order. APCC supports order details as a new Measure Group called Order Details, in which order attributes are exposed as measures. You can access this report as a contextual drill-down from the Build Plan report.

The report shows the list of attributes along with their relevance to Supplies only, Demands only, or both Supplies and Demands.

Attribute	Dim ?	Supplies	Demands	Aggregation Rule	Comments
Item	Product	Yes	Yes	NA	
Organization	Organization	Yes	Yes	NA	
Order Type	Order Type	Yes	Yes	NA	
Order Priority			Yes	Average	
Order Number		Yes	Yes	None	
Line Number		Yes	Yes	None	
Requested Date			Yes	Min	Timestamp Truncated
Suggested Due Date	Time	Yes	Yes	Min	Timestamp Truncated
Need By Date		Yes		Min	Timestamp Truncated
Days Late			Yes	Average	
Order Qty		Yes	Yes	Sum	
Firm Date		Yes		Min	Timestamp Truncated
Firm Qty		Yes	Yes	Sum	
Source Org		Yes		None	
Source Supplier	Supplier	Yes		NA	
Source Supplier Site	Supplier	Yes		NA	
Customer	Customer		Yes	NA	
Customer Site	Customer		Yes	NA	

Click Total Supply or Total Demand in the Build Plan report. Order Details refreshes and display the orders for that specific context of Item, Org, and Week based on all the dates that fall in that week according to the Sugg Due Date.

Supply Chain Analyst Secondary Drill-Down Reports

Primary reports are located on the six tabs in the Supply Chain Analyst Dashboard: Plan Health Summary, Demand and Supply, Resources, Exceptions, Historical Performance, and Scenario Analysis.

Secondary drill-down reports are reports that are accessed from the primary reports. They are often displayed in the context of where the user is drilling down from in the primary report. That is, if the user drills down from a data point in the primary report that displays the value for a product category, then the secondary report is displayed for that product category.

This table lists secondary reports for the Supply Chain Analyst Dashboard in alphabetical order:

Report Name	Measures or Facts	Dimension or View by
Aggregate Horizontal Plan	Total demand, total supply, safety stock, and projected available balance (PAB) – units	Plan
Days of Cover by Items	Exception count (use alternate sources or use alternate suppliers) and safety stock violations	Plan or Period
Days of Cover by Organizations	Days of cover	Organization
Demand and Supply Totals by Category	Total demand, forecast sales orders, past-due backlog quantity, total supply, on hand, days of cover, and scheduled receipts	Category
Demand and Supply Totals by Organization	Total demand, forecast sales orders, past-due backlog quantity, total supply, on hand, days of cover, and scheduled receipts	Organization
Detailed Horizontal Plan	Total demand, forecast, sales order, total supply, on hand, scheduled receipts, planned orders, safety stock, PAB – units	Plan
Exceptions by Categories	Based on the exception type that the user selects to drill down to the trend report, which is one of: Exception Count (stock outs, use alternate sources, or use alternate suppliers), Exception Days (late sales orders, rescheduled orders), Exception Value (late sales orders), Exception Quantity (late forecast), or Safety Stock Violations	Category

Report Name	Measures or Facts	Dimension or View by
Exceptions by Customers	Based on the exception type that the user selects to drill down to the trend report, which is one of: Exception Days (late sales orders, rescheduled orders), Exception Value (late sales orders), or Exception Quantity (late forecast)	Customer
Exceptions by Items	Based on the exception type that the user selects to drill down to the trend report, which is one of: Exception Count (stock outs, use alternate sources, use alternate suppliers), Exception Days (late sales orders, rescheduled orders), Exception Value (late sales orders), Exception Quantity (late forecast), or Safety Stock Violations	Item
Exceptions by Organizations	Based on the exception type that the user selects to drill down to the trend report, which is one of: Exception Count (stock outs), Exception Days (late sales orders, rescheduled orders), Exception Value (late sales orders), Exception Quantity (late forecast), or Safety Stock Violations	Organization
Exceptions by Suppliers	Based on the exception type that the user selects to drill down to the trend report, which is one of: Exception Count (use alternate sources and use alternate suppliers), or Exception Days (rescheduled orders)	Supplier

Report Name	Measures or Facts	Dimension or View by
Exceptions Trend	Based on the exception type that the user selects to drill down to the trend report, which is one of: Exception Count (stock outs, user alternate sources, or use alternate suppliers), Exception Days (late sales orders or rescheduled orders), Exception Value (late sales orders), Exception Quantity (late forecast or resource overload), or Safety Stock Violations	Exception type
Least Utilized Resources	Resource availability, resource requirement, or resource utilization	Resources
Most Utilized Resources	Resource availability, resource requirement, or resource utilization	Resources
Production to Plan by Organization	Production to plan	Organization
Resource Utilization Trend	Resource availability, resource requirement, or resource utilization	Plan
Resource Utilization by Department	Resource availability, resource requirement, or resource utilization	Department
Resource Utilization by Organizations	Resource availability, resource requirement, or resource utilization	Organization
Resource Utilization by Resource Groups	Resource availability, resource requirement, or resource utilization	Resource Group
Shipments to Plan by Organization	Shipments to plan	Organization

Report Name	Measures or Facts	Dimension or View by
WIP (work in progress) Start by Organizations	WIP start quantity	Organization

The following forms in the ASCP application are accessible from the supply chain analyst dashboard:

- Supply and Demand Detail.
- Resources.
- Exception Details.
- Items.

My Open Activities

When you are logged on, the two seeded dashboards, the Supply Chain Analyst dashboard and the Sales & Operations Planning Analyst dashboard, display an alert in the top right of the page whenever overdue open activities exist. This is based on a seeded iBot that is tied to a report called My Open Activities. When you click the alert icon, the My Open Activities table displays a complete list of all open activities for which you are the primary or secondary owner.

When you click an activity name in the My Open Activities table, the activities table in the Scenario management user interface opens and displays all the details of the activity. In this location, you can update the status, owner, and other details of the activity.

See *Working with Activities* in Chapter 2 for an understanding of planning activities.

Using the Sales and Operations Planning Analyst Dashboard

This chapter covers the following topics:

- Understanding the Sales and Operations Planning Dashboard
- Using the Demand Review Page
- Using the Supply Review Page
- Using the Financial Review Page
- Using the Executive Review Page
- Sales and Operations Planning Analyst Secondary Drill-Down Reports

Understanding the Sales and Operations Planning Dashboard

The Sales and Operations Planning analyst has access to a predefined dashboard with a selection of seeded reports. These reports enable the sales and operations planning analyst to perform tasks related to sales and operations planning and analysis. The report pages leverage the flexibility of the Oracle Business Intelligence – Enterprise Edition (OBI-EE) application, which enables the layout and content of the delivered reports to be customized by the user.

The reports for the sales and operations planning analyst are organized in logical groupings as pages, or tabs, within the Sales and Operations Planning Dashboard.

These pages are available for the sales and operations planning analyst:

- Demand Review.
- Supply Review.
- Financial Review
- Executive Review.

- Glossary.

The Glossary page provides:

- Definitions of all measures that are presented in the Sales and Operations Planning Dashboard.
- Information about the logic used to calculate each measure.

To change the dashboard layout, see Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide.

Using the Demand Review Page

This section provides an overview of the Demand Review page and discusses:

- Forecast Comparison Report
- Forecast Accuracy - MAPE Report
- Projected Backlog Report
- Consensus Tracking by Category Report
- Forecast - Scenario Comparison Report
- Demand Summary Report
- Top Abs Diff - Consensus and Financial Forecast by Category Report
- Consensus Forecast Difference by Customer Report
- Consensus Forecast Difference by Category Report

Understanding the Demand Review Page

The Demand Review page maps to the first phase of the Sales and Operations Planning business process. It provides the Sales and Operations Planning analyst the information to answer these questions:

- How has the plan changed?
- Is the order backlog increasing?
- How are we performing to the forecast?

To access the Demand Review page:

1. Select the Sales and Operations Planning Analyst responsibility.
2. Select the Demand Review tab.

Page-Level Filters

Page-level filters are provided at the top of the Demand Review page. Page-level filters are used to filter the results of the work areas.

This table lists the page level filters for the Demand Review page:

Filter	Description
Comparison Scenario	Select from a list of scenarios to use to compare to a baseline scenario. Multiple scenarios can be selected. This is a required field.
Baseline Scenario	Select from a list of scenarios to use as the baseline. Only one scenario can be selected. This is a required field.
Fiscal Year	Select from a list of fiscal years. Optionally, select multiple years.
Category Description (Inv.Items)	Select from a list of item categories. Multiple categories can be selected. This is an optional field.
Organization Code	Select from a list of organizations. Multiple organizations can be selected. This is an optional field.

Forecast Comparison Report

The Forecast Comparison report enables the sales and operations planning analyst to compare how raw forecasts from different stakeholders vary. The Consensus Forecast is the demand plan that is agreed upon between Sales, Marketing, and other Demand Management stakeholders. It is used for driving the manufacturing and supply plans.

In addition to the page-level filters at the top of the page, users can specify this filter for the report:

Field	Description
View	<p>Select how you want to view the report. These options are available:</p> <ul style="list-style-type: none"> • The Demand in Units (Chart) view plots shipment history, consensus forecast, final forecast, sales forecast, and marketing forecast over fiscal periods. • The Demand in Units (Table) view provides the values that correspond to the Demand in Units (Chart). • The Demand in Currency (Chart) view plots shipment history, consensus forecast, sales forecast, marketing forecast, and financial forecast in reporting currency. • The Demand in Currency (Table) view provides the values that correspond to the Demand in Currency (Chart).

Additional currency reports that you can access from the Forecast Comparison report are (in alphabetical order):

- Top Absolute (Abs) Difference (Currency) – Consensus and Budget by Organization.
- Top Abs Difference (Currency) – Consensus and Budget by Product Category.
- Top Abs Difference (Currency) – Consensus and Marketing by Organization.
- Top Abs Difference (Currency) – Consensus and Marketing by Product Category.
- Top Abs Difference (Currency) – Consensus and Sales by Organization.
- Top Abs Difference (Currency) – Consensus and Sales by Product Category.
- Top Abs Percent (%) Difference (Currency) – Consensus and Budget by Organization.
- Top Abs % Difference (Currency) – Consensus and Budget by Product Category.
- Top Abs % Difference (Currency) – Consensus and Marketing by Organization.

- Top Abs % Difference (Currency) – Consensus and Marketing by Product Category.
- Top Abs % Difference (Currency) – Consensus and Sales by Organization.
- Top Abs % Difference (Currency) – Consensus and Sales by Product Category.

Additional unit reports that you can access from the Forecast Comparison report are (in alphabetical order):

- Top Abs Difference – Consensus and Marketing by Organization.
- Top Abs Difference – Consensus and Marketing by Product Category.
- Top Abs Difference – Consensus and Sales by Organization.
- Top Abs Difference – Consensus and Sales by Product Category.
- Top Abs % Difference – Consensus and Marketing by Organization.
- Top Abs % Difference – Consensus and Marketing by Product Category.
- Top Abs % Difference – Consensus and Sales by Organization.
- Top Abs % Difference – Consensus and Sales by Product Category.

Users can also access the Sales and Operations Planning application by clicking the Consensus Forecast Product Category link.

Forecast Accuracy - MAPE Report

The Forecast Accuracy - MAPE report enables the sales and operations planning analyst to determine the accuracy of the Consensus Forecast over time.

In addition to the page level filters at the top of the page, users can specify this filter for the report:

Field	Description
View	<p>Select how you want to view the report. Options include Chart and Table.</p> <p>The Chart view plots consensus forecast accuracy MAPE for week four, week eight, and week thirteen. The Table view provides the values that correspond to the Chart view.</p>

Additional reports that you can access from the Forecast Accuracy - MAPE report are (in alphabetical order):

- Bottom – 8 week Forecast Accuracy by Item.
- Bottom – 8 week Forecast Accuracy by Organization.
- Bottom – 8 week Forecast Accuracy by Product Category.
- Bottom – 8 week Forecast Accuracy by Customer.

Users can also access the Sales and Operations Planning application by clicking the Consensus Waterfall Analysis Product Category link.

Projected Backlog Report

The Projected Backlog report enables the sales and operations planning analyst to:

- Determine whether order backlog is increasing by analyzing the trends in actual backlog history and projected backlog.
- Compare projected backlog between the baseline and comparison scenarios.

In addition to the page-level filters at the top of the page, users can specify this filter for the report:

Field	Description
View	<p>Select how you want to view the report. Options include Chart and Table.</p> <p>The Chart view plots actual backlog and projected backlog for multiple fiscal periods. The Table view provides the values that correspond to the Chart view.</p>

Additional reports that you can access from the Projected Backlog report are (in alphabetical order):

- Actual Backlog Distribution by Operating Unit.
- Actual Backlog Distribution by Product Category.
- Consolidated Analysis by Fiscal Period.
- Demand Fill by Fiscal Period.
- Projected Backlog Distribution by Operating Unit.
- Top Actual Backlog by Customer.

- Top Actual Backlog by Item.
- Top Actual Backlog by Organization.
- Top Actual Backlog by Product Category.
- Top Projected Backlog by Customer.
- Top Projected Backlog by Item.
- Top Projected Backlog by Organization.
- Top Projected Backlog by Product Category.

Users can also access the Sales and Operations Planning application by clicking the Projected Backlog Product Category link.

Consensus Tracking by Category Report

The Consensus Tracking by Category report enables the sales and operations planning analyst to track forecast attainment by comparing bookings, with future dates, and consensus forecasts. The report is displayed for the selected baseline scenario only.

In addition to the page level filters at the top of the page, users can specify these filters for the report:

Field	Description
View	<p>Select how you want to view the report. Options include Chart and Table.</p> <p>The Chart view plots attained percent against item categories. The Table view provides the values that correspond to the Chart view.</p>
Fiscal Period Name	Select a fiscal period.

Additional reports that you can access from the Consensus Tracking by Category report are (in alphabetical order):

- Bottom Attained % by Customer.
- Bottom Attained % by Item.
- Bottom Attained % by Organization.
- Consolidated Analysis by Fiscal Period.

- Demand Fill by Fiscal Period.
- Top Attained % by Customer.
- Top Attained % by Item.
- Top Attained % by Organization.

Users can also access the Sales and Operations Planning application by clicking the Consensus Forecast Product Category link.

Forecast - Scenario Comparison Report

The Forecast - Scenario Comparison report enables the sales and operations planning analyst to determine how forecast data differs between the baseline and comparison scenarios.

In addition to the page-level filters at the top of the page, users can specify this filter for the report:

Field	Description
Measure	Select the measure that you would like to view. Options include: Bookings Forecast, Consensus Forecast, Final Forecast, Marketing Forecast, Sales Forecast, and Shipment Forecast.

Additional reports that you can access from the Forecast – Scenario Comparison report are (in alphabetical order):

- Forecast Distribution by Operating Unit.
- Forecast Distribution by Product Category.
- Top Unit Volume by Organization.
- Top Unit Volume by Product Category.

Users can also access the Sales and Operations Planning application by clicking the Consensus Forecast Product Category link.

Demand Summary Report

The Demand Summary report provides key demand metrics at-a-glance in units and in reporting currency and supports plan-over-plan comparison.

Operating Plan Value measure is the sum of Shipment History and Constrained Forecast in reporting currency. This measure is used to compare operating performance relative to Financial Forecast and Budget.

Top Abs Diff - Consensus and Financial by Category

This summary report ranks the top difference between the Consensus Forecast Value and the Financial Forecast Value by Product Category for the baseline scenario.

Consensus Forecast Difference by Customer Report

This summary report provides plan-over-plan comparison of the Consensus Forecast at the customer level. Diff(ERENCE) % relates the Comparison Scenario Consensus forecast with the Baseline Scenario Consensus forecast. You can access the Forecast - Scenario Comparison Trend report by selecting a value in the Diff % column from this report.

Consensus Forecast Difference by Category Report

This summary report provides plan-over-plan comparison of the Consensus Forecast at the product category level. Diff(ERENCE) % relates the Comparison Scenario Consensus forecast with the Baseline Scenario Consensus forecast. You can access the Forecast - Scenario Comparison Trend report by selecting a value in the Diff % column from this report.

Using the Supply Review Page

This section provides an overview of the Supply Review page and discusses:

- Consolidated Analysis.
- Demand Fill.
- Production Plan Comparison by Organization.
- Production Plan.
- Top - Supplier Item Utilization.
- Top Resource Utilization by Organization.
- Consolidated - Scenario Comparison.
- Supply Summary.
- Bottom Demand Fill % by Customer.
- Supply Change by Category

- Top Resource Utilization.
- Strategic Plans.

Understanding the Supply Review Page

The Supply Review page maps to the second phase of the Sales and Operations Planning business process. It provides the Sales and Operations Planning analyst the information to answer these questions:

- How are product categories performing?
- Are we supply-constrained?
- Are we producing to the plan?
- Where are we resource-constrained?
- Where are we supplier-constrained?

To access the Supply Review page:

1. Select the Sales and Operations Planning Analyst responsibility.
2. Select Sales and Operations Planning Dashboard.
3. Select the Supply Review tab.

Page-Level Filters

Page-level filters are provided at the top of the Supply Review page. Page level filters are used to filter the results of the work areas.

This table lists the page-level filters for the Supply Review page:

Filter	Description
Comparison Scenario	Select from a list of scenarios with which to compare to a baseline scenario. Multiple scenarios can be selected. This is a required field.
Baseline Scenario	Select from a list of scenarios to be used as the baseline. Only one scenario can be selected. This is a required field.

Filter	Description
Fiscal Year	Select from a list of fiscal years. Multiple years can be selected. This is an optional field.
Organization Code	Select from a list of organizations. Multiple organizations can be selected. This is an optional field.

Consolidated Analysis Report

The Consolidated Analysis report enables the sales and operations planning analyst to determine whether sufficient inventory is available to meet demand and safety stock levels.

In addition to the page-level filters at the top of the page, users can specify this filter for the report:

Field	Description
View	<p>Select the option that you want to view. Options include</p> <ul style="list-style-type: none"> • Units – displays total demand, total supply, projected available balance in units, and safety stock. • Turns/Cover – displays projected available balance in days of cover and inventory turns. • Currency – displays projected available balance in value. • Table – displays all measures over the horizon.

Additional reports that you can access from the Consolidated Analysis report are (in alphabetical order):

- Bottom-Inventory Turns by Organization.
- Bottom-Inventory Turns by Product Category.

- Consolidated Analysis by Fiscal Period.
- Consolidated Analysis – Unit Breakdown by Organization.
- Inventory Value – Distribution by Organization.
- Top-Inventory Turns by Organization.
- Top-Inventory Turns by Product Category.
- Top Inventory Value by Organization.
- Top Inventory Value by Product Category.

Users can also access the Sales and Operations Planning application by clicking the Consolidated Plan Product Category link.

Demand Fill Report

The Demand Fill report enables the sales and operations planning analyst to determine whether the unconstrained, consensus forecast that is received by the Sales and Operations Planning application could be achieved on the supply side.

In addition to the page-level filters at the top of the page, users can specify this filter for the report:

Field	Description
View	<p>Select the option that you want to view. Options include:</p> <ul style="list-style-type: none"> • Fill Chart: Displays the percent of demand fulfillment and the percent of project demand fulfillment. • Forecast Chart: Displays shipment history, consensus forecast, and constrained forecast. • Table: Displays all measures over the horizon.

Additional reports that you can access from the Demand Fill report are (in alphabetical order):

- Bottom – Demand Fill % by Customer.

- Bottom – Demand Fill % by Item.
- Bottom – Demand Fill % by Organization.
- Bottom – Demand Fill % by Product Category.
- Demand Shortfall by Organization – units.
- Demand Shortfall by Product Category – units.
- Top Demand Fill % by Customer.
- Top Demand Fill % by Organization.
- Top Demand Fill % by Product Category.

Production Plan Comparison by Organization Report

The Production Plan Comparison by Organization report enables the sales and operations planning analyst to compare production plans by organization between scenarios. This report provides a visual cue of relative differences when the column heights differ between scenarios and organizations.

Additional reports that you can access from this report are (in alphabetical order):

- Production to Plan by Category
- Production Plan Monthly
- Resource Utilization.

Users can also access the Sales and Operations Planning application by clicking the Production Plan Product Category link.

Production Plan Report

The Production Plan report enables the sales and operations planning analyst to compare production to plan adherence percent between the baseline and comparison scenarios. This report displays the production plan over the time horizon. Production history is displayed for historical periods.

In addition to the page-level filters at the top of the page, users can specify this filter for the report:

Field	Description
View	<p>Select the option that you want to view. Options include</p> <ul style="list-style-type: none"> • Chart: Displays production history and the production plan as a bar graph. • Table: Displays all measures over the horizon.

Additional reports that you can access from the Production Plan report are (in alphabetical order):

- Production to Plan by Category
- Production Plan by Organization
- Consolidated Analysis

Top – Supplier Item Utilization Report

The Top – Supplier Item Utilization report enables the sales and operations planning analyst to review the most utilized supplier items for all suppliers. The report is displayed for the selected baseline scenario.

In addition to the page-level filters at the top of the page, users can specify these filters for the report:

Field	Description
View	<p>Select the option that you want to view. Options include</p> <ul style="list-style-type: none"> • Chart : Displays the percent of supplier capacity utilization as a bar graph at a summary level. • Table : Displays all measures over the horizon.

Additional reports that you can access from the Top – Supplier Item Utilization report are (in alphabetical order):

- Item Supplier Capacity.

- Supplier Item Capacity
- Top - Supplier Requirements
- Top n- Supplier Item Requirements

Top Resource Utilization by Organization Report

The Top Resource Utilization by Organization report enables the sales and operations planning analyst to view total resource utilization ranked by organization for the baseline scenario.

Additional reports that you can access from the Top Resource by Utilization by Organization report are (in alphabetical order):

- Production Plan Monthly.
- Resource Utilization.

Consolidated – Scenario Comparison Report

The Consolidated – Scenario Comparison report enables the sales and operations planning analyst to determine whether sufficient inventory is available to meet demand and safety stock levels, which is the same as the Consolidated Analysis report. However, the Consolidated – Scenario Comparison report supports direct scenario comparison of each measure individually. The report provides a visual cue of comparative differences when the lines diverge between scenarios.

In addition to the page level filters at the top of the page, users can specify this filter for the report:

Field	Description
Measure	Select the option that you want to view. Options include PAB (projected available balance) – units, PAB – value, PAB – Days of Cover, Inventory Turns, Safety Stock, Total Supply, Total Demand.

Additional reports that you can access from the Consolidated – Scenario Comparison report are (in alphabetical order):

- Bottom – Inventory Turns by Organization.
- Bottom – Inventory Turns by Product Category.

- Consolidated Analysis by Fiscal Period.
- Consolidated Analysis – Unit Breakdown by Organization.
- Inventory Value – Distribution by Organization.
- Top – Inventory Turns by Organization.
- Top – Inventory Turns by Product Category.
- Top Inventory Value by Organization.
- Top Inventory Value by Product Category.

Users can also access the Sales and Operations Planning application by clicking the Consolidated Plan Product Category link.

Supply Summary Report

Supply summary report provides key supply metrics at-a-glance in units and in reporting currency and supports plan-over-plan comparison. Projected Demand Fill is the future fill rate coming from supply planning.

Access to gap closure analysis is available directly from various fields of this report, as shown in the table below:

From the Field	Available Reports
Total Demand	Demand Utilization – Units
	Demand Utilization – Value
Total Supply	Supply Utilization – Units
	Supply Utilization – Value

Constrained Forecast Value

Bookings Performance – Units

Bookings Performance – Value

Shipment Performance – Units

Shipment Performance – Value

Backlog Analysis – Units

Backlog Analysis – Value

Sales Order Analysis – Units

Sales Order Analysis – Value

Current Shipment Plan

For details about the available reports, see the chapter in this document *Using the Supply Chain Analyst Dashboard*.

Bottom Demand Fill % by Customer Report

Bottom Demand Fill % by Customer is a summary report that ranks the bottom fill rate by customer for the baseline scenario. This report highlights the customers that will have the biggest fulfillment issues based upon the current operating plan.

Supply Change by Category Report

This summary report provides plan-over-plan comparison of Total Supply at the category level. Diff(ERENCE) % relates the Comparison Total Supply with the Baseline Total Supply. You can access the Consolidated - Scenario Comparison Trend report by selecting a value in the Diff % column from this report.

Top Resource Utilization Report

Top Resource Utilization summary report that shows resource utilization ranked by resource (and the organization in which it resides) in order to understand which resources are most constrained for the baseline scenario.

Strategic Plans Report

Strategic Plans report provides contextual navigation from the selected comparison scenario(s) to the supply planning application used in the scenario(s). This assumes a supply planning application such as Strategic Network Optimization, Rapid Planning, or Advanced Supply Chain Planning is used in the scenario.

Using the Financial Review Page

This section provides an overview of the Financial Review Page. You can access the following reports from the Financial Review page:

- Financial Summary
- Operating Plan and Financial Forecast Comparison
- Top % Difference – Operating Plan and Budget by Category
- Financial Analysis
- Profit and Loss Monthly
- Margin Difference by Category
- Year over Year Financials
- Financial Forecast and Budget Comparison
- Top % Difference – Budget and Annual Plan by Organization
- Top Revenue
- Cost by Organization
- Bottom Margin
- Profitability KPI
- Cost Breakdown KPI

Understanding the Financial Review Page

The Financial Review page supports an integrated reconciliation of demand and supply plans in terms of revenue, cost, and gross margin. It also indicates how operational plans are performing relative to financial forecasts. Questions you can answer through these reports may include:

- Are we on plan?
- What are the changes when compared to the last fiscal quarter or month?
- Has profitability changed? If so, how, why, and where has it changed?

Page Level Filters

Page Level filters at the top of the Financial Review page allow you to filter your results by various criteria. The page level filters for the Financial Review page are the same as those for the Demand Review page. For details, refer to the section about the Demand Review Page in this document.

Financial Summary Report

The Financial Summary report provides summary information about:

- Shipments Year Ago
- Shipment History Value
- Consensus Forecast Value
- Constrained Forecast Value
- Operating Plan - Value
- Financial Forecast Value
- Budget
- Annual Plan Value
- Inventory History - Value
- Actual Backlog - Value (reporting currency)
- Total Excess (value)
- Total Obsolescence (value)

All information is given in reporting currency.

Navigations are available from all report measures. For example, To view the Shipments Year Ago, you can filter to see the Top Abs Diff - Shipments versus Year Ago by Category Summary, Organization Summary, or Customer Summary, as well as Shipment History Trend.

To view Total Excess Value detail, select:

- Excess Value by Category.
- Excess Value by Organization.

To view Total Obsolescence Value detail, select:

- Obsolescence Value by Category.
- Obsolescence Value by Organization.

Operating Plan and Financial Forecast Comparison Report

This report compares Operating Plan Value and Financial Forecast Value measures on a fiscal quarterly basis. It reports:

- Operating Plan Value in reporting currency
- Financial Forecast Value in reporting currency
- The calculated difference between these measures.
- The calculated difference between these measures as a percentage.

Navigations are available from this report to view information at greater detail by category or by organization.

Top % Difference – Operating Plan and Budget by Category Report

The Top % Difference – Operating Plan and Budget by Category report provides a comparison between your operating plan and your budget. It reports:

- Operating Plan value in reporting currency
- Budget in reporting currency
- The calculated difference between the operating plan and budget.
- The calculated difference between the operating plan and budget as a percentage.

Navigations are available from this report to view category level information by organization. You can also navigate to a financial trend report using the category as a filter.

Financial Analysis Report

The Financial Analysis report is similar to the Budget Analysis report in the Executive review page. This trend report compares the operating plan with financial forecast measures.

The Financial Analysis report provides information in a chart or table format.

The chart view provides navigations, such as the following:

- Top Abs Diff (Currency) – Operating Plan and Financial Forecast by Category

- Top Abs % Diff (Currency) – Operating Plan and Financial Forecast by Category
- Top Abs % Diff (Currency) – Operating Plan and Financial Forecast by Category
- Top Abs Diff (Currency) – Operating Plan and Financial Forecast by Organization
- Top Abs % Diff (Currency) – Operating Plan and Financial Forecast by Organization
- Top Abs Diff (Currency) – Operating Plan and Financial Forecast by Customer
- Top Abs % Diff (Currency) – Operating Plan and Financial Forecast by Customer

The table view provides the following navigations from the Financial Forecast Value:

- Top Abs Diff (Currency) – Budget and Financial Forecast by Category
- Top Abs % Diff (Currency) – Budget and Financial Forecast by Category
- Top Abs Diff (Currency) – Budget and Financial Forecast by Organization
- Top Abs % Diff (Currency) – Budget and Financial Forecast by Organization

The table view provides the following navigations from the Budget column:

- Top Abs Diff (Currency) – Annual Plan and Budget by Category
- Top Abs % Diff (Currency) – Annual Plan and Budget by Category
- Top Abs Diff (Currency) – Annual Plan and Budget by Organization
- Top Abs % Diff (Currency) – Annual Plan and Budget by Organization

Profit & Loss Monthly Report

The Profit & Loss report on the financial tab is similar to the Profit & Loss Statement in the Executive Review. The difference is that the financial tab Profit & Loss report highlights fiscal periods rather than fiscal quarters.

The Report can be viewed as a chart or a table. The chart view provides the following navigations:

- The Report can be viewed as a chart or a table. The chart view
- Top Revenue by Customer
- Cost by Category
- Margin by Category

- Margin % by Category
- Cost by Organization
- Margin by Organization
- Cost by Type

The Profit & Loss table view provides the following information:

Revenue column:

- Revenue by Category
- Revenue by Organization

Total Supply Chain Costs

- Cost by Organization
- Cost by Category
- Cost by Type

Gross Margin Column

- Margin by Organization
- Margin by Category

Margin Difference by Category Report

The Margin Difference by Category report compares Gross Margin between scenarios at the product category level.

When you navigate from the Diff% column in this report to the Margin Scenario Comparison Trend report you see all the comparison scenarios for the selected category. The Diff % column in this report also provides you with navigation to the Revenue Scenario Comparison Trend report and displays all comparison scenarios for the selected category.

Year-Over-Year Financials Report

The Year-Over-Year Financial Report compares financial measures by fiscal year. That is, the "Trend" calculated measures identify the percent change between fiscal years. When you select the fiscal year in the column heading, the result is a hierarchical time drilldown on the selected year to reveal the percent change between fiscal quarters. The report displays fiscal years for both historical and forecast horizons. That is, it displays the preceding year, the current year, and the next year.

Navigations are available to the Year-Over-Year Financials by Organization and Year-Over-Year Financials by Category reports.

Note: The financial measure Operating Plan is associated with the baseline scenario therefore, the report title includes the baseline scenario name.

Financial Forecast and Budget Comparison Report

This report compares Financial Forecast and Budget by fiscal quarter. The information in this report includes:

- Financial Forecast Value (in reporting currency)
- Budget (in reporting currency)
- Difference
- Difference %

Navigations are available from the chart and the table columns Difference and Difference % to view information at greater detail by category or by organization.

Top % Difference – Budget and Annual Plan by Organization Report

The Top % Difference – Budget and Annual Plan by Organization report provides a comparison between your Budget and Annual Plan at the organization level. It reports:

- Budget in reporting currency
- Annual Plan Value in reporting currency
- The calculated difference between the Annual Plan and Budget
- The difference between the Annual Plan and Budget as a percentage

Navigations are available from this report to view organization level information detailed by product category. You can also navigate to a financial trend report using the organization as a filter.

Top Revenue Report

This report contains revenue information. You can choose the dimension by which you want rank the report data. In the Dimension field at the top of your screen, choose one of:

- (Customer) Zone

- Customer
- Category
- Organization

The Top Revenue Report contains the following navigations:

- Top Revenue by Category
- Top Revenue by Organization
- Top Revenue by Customer
- Top Revenue by Customer Zone
- Profit and Loss Statement by Fiscal Period

For example, if you want to pivot from Top Revenue dimensioned by Zone to customer rankings in a specific zone then you can use the Top Revenue by Customer navigation report. You can navigate further to discover category revenue rankings for a specific customer in that zone by selecting the Top Revenue by Category report.

Cost by Organization

The Cost by Organization report provides the allocation of total supply chain costs by organization. This report includes revenue and margin information by organization in the table view. There are navigations to cost by category and cost by type reports while passing organizational context.

Bottom Margin Report

This report ranks gross margin from worst to best. You can choose the dimension by which you want to rank the report data. In the Dimension field at the top of your screen, choose one of:

- Category
- Organization
- (Customer) Zone
- Customer

This report provides the following navigations:

- Bottom Margin by Category
- Bottom Margin by Organization

- Bottom Margin by Customer
- Bottom Margin by Customer Zone
- Top Margin by Category
- Top Margin by Organization
- Top Margin by Customer
- Top Margin by Customer Zone
- Profit and Loss Statement by Fiscal Period

For example, if you want to pivot from the Bottom Margin report dimensioned by Zone to top customer rankings in a specific zone then you can use the Top Margin by Customer navigation report.

Profitability KPI and Cost Breakdown KPI Reports

The Key Performance Indicators reports enable the sales and operations planning analyst to determine how the organization is performing. The analyst can compare relative performance between the baseline and comparison scenarios.

Both these reports are identical to those found in the Executive Review. For more information about either report, please refer to the Executive Review section of this document.

Using the Executive Review Page

This section provides an overview of the Executive Review page and discusses:

- Consolidated Analysis.
- Profit and Loss Statement.
- Constrained Forecast Comparison.
- Budget Analysis.
- Key Performance Indicators.
- Executive Summary
- Top Difference - Operating Plan and Financial Forecast by Category
- Profitability KPI

- Cost Breakdown KPI
- Consensus Forecast Difference by Customer

Note: The Consensus Forecast Difference by Customer report is the same one that appears in the Demand Review tab. For more information on this report, refer to the Demand Review section of this document.

Understanding the Executive Review Page

The Executive Review page maps to the final phase of the Sales and Operations Planning business process. It provides the Sales and Operations Planning analyst the information to answer these questions:

- How are we performing financially to our plan?
- Are we above our budget and if so, in which areas?
- What are our performance metrics?

To access the Executive Review page:

1. Select the Sales and Operations Planning Analyst responsibility.
2. Select Sales and Operations Planning Dashboard.
3. Select the Executive Review tab.

Page-Level Filters

Page-level filters are provided at the top of the Executive Review page. Page level filters are used to filter the results of the work areas.

This table lists the page-level filters for the Executive Review page:

Filter	Description
Comparison Scenario	Select from a list of scenarios by which to compare to a baseline scenario. Multiple scenarios can be selected. This is a required field.
Baseline Scenario	Select from a list of scenarios to be used as the baseline. Only one scenario can be selected. This is a required field.

Filter	Description
Category Description (Inv. Items)	Select from a list of item categories. Multiple categories can be selected. This is an optional field.
Fiscal Year	Select from a list of fiscal years. Multiple years can be selected. This is an optional field.

Consolidated Analysis

The Consolidated Analysis report that appears on the Executive Review tab is the same as the Consolidated Analysis report that appears on the Supply Review tab.

See Consolidated Analysis, page 6-11

Profit and Loss Statement

The Profit and Loss Statement report enables the sales and operations planning analyst to determine the integrated financial performance of the organization. The analyst can compare relative performance between the baseline and comparison scenarios for which supply and demand is not the same.

In addition to the page-level filters at the top of the page, users can specify this filter for the report:

Field	Description
View	<p>Select the option that you want to view. Options include:</p> <ul style="list-style-type: none"> • Profit & Loss Chart: Displays revenue, costs, and margin as a bar chart with margin percent as a line chart over fiscal quarters. • Profit & Loss Table: Displays all measures over the time period.

Additional reports that you can access from the Profit and Loss Statement report are (in alphabetical order):

- Cost by Organization.

- Cost by Type.
- Margin by Organization.
- Profit and Loss Statement by Fiscal Period.
- Revenue by Organization.

Users can also access the Sales and Operations Planning application by clicking the Financial Summary Product Category Worksheet link.

Constrained Forecast Comparison

The Constrained Forecast Comparison report is similar to the Forecast Comparison report on the Demand Review tab except that the former includes constrained forecasts.

See Forecast Comparison, page 6-3.

In addition to the page-level filters at the top of the page, users can specify this filter for the report:

Field	Description
View	<p>Select how you want to view the report. Options include:</p> <ul style="list-style-type: none"> • Demand in Units (Chart): Plots shipment history, final forecast, consensus forecast, sales forecast, marketing forecast, consensus forecast, and constrained forecast over fiscal periods. • Demand in Units (Table): Provides the values that correspond to the Demand in Units (Chart). • Demand in Currency (Chart): Plots the shipment history value, final forecast, sales forecast value, marketing forecast value, consensus forecast value, constrained forecast value, and budget over fiscal periods. All values are in the reporting currency. • Demand in Currency (Table): Provides the values that correspond to the Demand in Currency (Chart).

Additional reports that you can access from the Constrained Forecast Comparison report are (in units and in alphabetical order):

- Top Abs (absolute) Diff (difference) – Consensus and Constrained by Organization.
- Top Abs % (percent) Diff – Consensus and Constrained by Organization.
- Top Abs Diff – Consensus and Constrained by Product Category.
- Top Abs % Diff – Consensus and Constrained by Product Category.

Additional reports that you can access from the Constrained Forecast Comparison report are (in currency and in alphabetical order):

- Top Abs Diff (Currency) – Consensus and Budget by Organization.
- Top Abs Diff (Currency) – Consensus and Budget by Production Category.
- Top Abs Diff – Consensus and Constrained by Organization.
- Top Abs Diff – Consensus and Constrained by Product Category.
- Top Abs % (percent) Diff (Currency) – Consensus and Budget by Organization.
- Top Abs % Diff (Currency) – Consensus and Budget by Production Category.
- Top Abs % Diff – Consensus and Constrained by Organization.
- Top Abs % Diff – Consensus and Constrained by Product Category.

Users can also access the Sales and Operations Planning application by clicking the Cumulative Plan Product Category Worksheet link.

Budget Analysis

The Financial Forecast Analysis report enables the sales and operations planning analyst to determine whether the organization will meet its budget by the end of the fiscal year.

In addition to the page-level filters at the top of the page, users can specify this filter for the report:

Field	Description
View	<p>Select how you want to view the report. Options include Chart and Table.</p> <p>The chart view plots the consensus forecast, operating plan, budget and financial forecast over fiscal periods. The table view provides the values that correspond to the Chart view and also cumulative values for operating plan and financial forecast.</p>

Additional reports that you can access from this report include (in alphabetical order):

- Top Abs Diff (Currency) - Operating Plan and Financial Forecast by Customer
- Top Abs Diff (Currency) - Operating Plan and Financial Forecast by Organization
- Top Abs Diff (Currency) - Operating Plan and Financial Forecast by Customer
- Top Abs % Diff (Currency) - Operating Plan and Financial Forecast by Category
- Top Abs % Diff (Currency) - Operating Plan and Financial Forecast by Organization
- Top Abs % Diff (Currency) - Operating Plan and Financial Forecast by Customer

Key Performance Indicators

The Key Performance Indicators reports enable the sales and operations planning analyst to determine how the organization is performing. The analyst can compare relative performance between the baseline and comparison scenarios.

Additional reports that you can access from the Key Performance Indicators reports are (in alphabetical order):

- Bottom – 8 week Forecast Accuracy by Product Category.
- Bottom – 8 week Forecast Accuracy by Organization.
- Bottom – Perfect Order Index.
- Bottom – Perfect Order Index by Organization.
- Consolidated Analysis by Fiscal Period.
- Inventory Turns by ABC Class.

- Inventory Value – Distribution by Organization.
- Perfect Order Index by Product Category.
- Safety Value – Distribution by Organization.
- Top – Days of Cover by Item.

Executive Summary

Executive Summary is a summary report that provides key metrics at-a-glance for busy executives and supports plan-over-plan comparison.

Operating Plan measure is the sum of Shipment History and Constrained Forecast in reporting currency. This measure is used to compare operating performance relative to Budget. Projected Demand Fill is the future fill rate coming from supply planning.

Top Difference - Operating Plan and Financial Forecast by Category

Top Difference - Operating Plan and Financial Forecast by Category is a summary report that ranks the top difference between the Operating Plan and the Financial Forecast by Product Category for the baseline scenario. Operating Plan measure is the sum of Shipment History and Constrained Forecast in reporting currency. This measure is used to compare operating performance relative to updated financial target.

Consensus Forecast Difference by Customer

Consensus Forecast Difference by Customer is a summary report that provides plan-over-plan comparison of the Consensus Forecast at the customer level. Diff(ference) % relates the Comparison Scenario Consensus forecast with the Baseline Scenario Consensus forecast.

Profitability KPI

Profitability KPI provides plan-over-plan comparison of profitability measures such as Revenue, Cost, Margin, and Margin %.

Cost Breakdown KPI

Cost Breakdown KPI is a summary report that provides plan-over-plan comparison of cost type measures including Purchasing Cost, Transportation Cost, Carrying Cost and Manufacturing Cost. Total (Supply Chain) Cost is the sum of manufacturing, purchasing, transportation and carrying costs in reporting currency.

Sales and Operations Planning Analyst Secondary Drill-Down Reports

Primary reports are located on the main pages in the Sales and Operations Planning Analyst Dashboard: Demand Review, Supply Review, Financial Review and Executive Review.

Secondary reports are reports that you access from the primary reports. They often appear in the context of the primary report. That is, if the primary report is displaying the product category, then the secondary report displays product category.

This table lists secondary reports for the Sales and Operations Planning Analyst Dashboard in alphabetical order:

Report Name	Measures or Facts	Dimension or View by
Actual Backlog Distribution by:	Actual Back	Operating Unit
<ul style="list-style-type: none"> Operating Unit Organization Product Category 		Product Category
Bottom – 8 week Forecast Accuracy by:	Consensus forecast accuracy – MAPE – 8 week	Item
<ul style="list-style-type: none"> Item Organization Customer Product Category 		Organization
		Product Category
Bottom Attained % by:	Booking history, consensus forecast	Customer
Customer		Item
Item		Organization
Organization		Product Category
Product Category		

Report Name	Measures or Facts	Dimension or View by
Bottom – Demand Fill % by:	Consensus forecast, shipment history, constrained forecast	Customer
Customer		Item
Item		Organization
Organization		Product Category
Product Category		
Bottom - Inventory Turns by:	Inventory Turns	Item
Item		Organization
Item – ABC class		Product Category
Organization		
Product Category		
Bottom – Perfect Order Index by:	Perfect order index	Item
Item		Organization
Organization		Product Category
Product Category		
Bottom – Production to Plan by:	Production history, production plan, production to plan	Item
Item		Product Category
Product Category		
Bottom – Shipments to Plan by:	Shipments to plan	Item
Item		Organization
Organization		Product Category
Product Category		

Report Name	Measures or Facts	Dimension or View by
Consolidated Analysis by Fiscal Period	Projected available balance (PAB) – units, safety stock, total supply, total demand, PAB – days of cover, inventory turns, PAB – value (reporting currency)	Baseline scenario
Consolidated Analysis – Unit Breakdown by Organization	PAB – units	Organization
Cost by Organization	Cost	Organization
Cost by Type	Cost	Product Category Organization
Demand Fill by Fiscal Period	Consensus forecast, shipment history, constrained forecast	Baseline scenario Comparison scenario
Demand Shortfall by: Organization – units Product Category – units	Unmet demand – units (forecast)	Organization Product Category
Forecast Accuracy by Fiscal Period	Consensus Forecast accuracy - MAPE - 4 week, Consensus Forecast accuracy - MAPE - 8 week, Consensus Forecast accuracy - MAPE - 13 week	Baseline scenario
Forecast Comparison	Consensus forecast, sales forecast, marketing forecast, consensus forecast – value (reporting currency), sales forecast – value (reporting currency), marketing forecast – value (reporting currency), budget (reporting currency), shipment history, shipment history – value (reporting currency)	Baseline scenario

Report Name	Measures or Facts	Dimension or View by
Forecast Distribution by: Item Operating Unit Organization Product Category	Consensus forecast, consensus forecast – value (reporting currency), consensus forecast - cumulative	Item Operating Unit Organization Product Category
Inventory Turns by ABC Class	Inventory Turns	Product Category
Inventory Value – Distribution by Organization	Projected available balance – value (reporting currency)	Organization
Item Supplier Capacity	Required supplier capacity, available supplier capacity (table only), net available cumulative capacity, supplier utilization percent	Supplier Supplier site Item
Margin by Organization	Margin	Organization
Perfect Order Index by Product Category	Perfect Order Inde	Product Category
Production Plan by Fiscal Period	Production history, production plan, production to plan	Baseline scenario Comparison scenario
Profit and Loss Statement by Fiscal Period	Revenue, cost, margin, margin percent	Period
Projected Backlog Distribution by: Operating Unit Organization Product Category	Projected Backlog	Operating Unit Organization Product Category

Report Name	Measures or Facts	Dimension or View by
Resource Utilization	Required capacity, available capacity, net available capacity, resource utilization percent	Resource and Organization
Revenue by Organization	Revenue	Organization
Safety Stock – Distribution by Organization	Safety Stock	Organization
Supplier Item Capacity	Required supplier capacity, available supplier capacity (table only), net available cumulative capacity, supplier utilization percent	Supplier Supplier site Item
Top Absolute Difference – Consensus and Constrained by:	Absolute difference = consensus forecast – constrained forecast	Customer Item Organization Product Category
Top Absolute Difference – Consensus and Marketing by:	Absolute difference = consensus forecast – marketing forecast	Organization Product Category
Top Absolute Difference – Consensus and Sales by:	Absolute difference = consensus forecast – sales forecast	Customer Item Organization Product Category

Report Name	Measures or Facts	Dimension or View by
Top Absolute Difference (Currency) – Consensus and Budget by:	Absolute difference = Consensus forecast – value (reporting currency) – budget (reporting currency)	Customer Item Organization Production Category
Customer		
Item		
Organization		
Production Category		
Top Absolute Difference (Currency) – Consensus and Constrained by:	Absolute difference = consensus forecast – value (reporting currency) – constrained forecast – value (reporting currency)	Customer Item Organization Production Category
Customer		
Item		
Organization		
Production Category		
Top Absolute Difference (Currency) – Consensus and Marketing by:	Absolute difference = consensus forecast – value (reporting currency) – Marketing forecast - value (reporting currency)	Organization Product Category
Organization		
Product Category		
Top Absolute Difference (Currency) – Consensus and Sales by:	Absolute difference = consensus forecast – value (reporting currency) – sales forecast – value (reporting currency)	Organization Product Category
Organization		
Product Category		

Report Name	Measures or Facts	Dimension or View by
Top Absolute % (percent) Difference – Consensus and Constrained by:	Absolute percent difference = (consensus forecast – constrained forecast) / consensus forecast x 100	Customer Item Organization Product Category
Customer		
Item		
Organization		
Product Category		
Top Absolute % Difference – Consensus and Marketing by:	Absolute percent difference = (consensus forecast – marketing forecast) / consensus forecast x 100	Organization Product Category
Organization		
Product Category		
Top Absolute % Difference – Consensus and Sales by:	Absolute percent difference = (consensus forecast – sales forecast) / consensus forecast x 100	Customer Item Organization Product Category
Customer		
Item		
Organization		
Product Category		
Top Absolute % Difference (Currency) – Consensus and Budget by:	Absolute percent difference = (consensus forecast – value (reporting currency) – budget (reporting currency)) / consensus forecast – value (reporting currency) x 100	Organization Product Category
Organization		
Product Category		
Top Absolute % Difference (Currency) – Consensus and Constrained by:	Absolute percent difference = consensus forecast – value (reporting currency) – constrained forecast – value (reporting currency)) / consensus forecast – value (reporting currency) x 100	Customer Item Organization Product Category
Customer		
Item		
Organization		
Product Category		

Report Name	Measures or Facts	Dimension or View by
Top Absolute % Difference (Currency) – Consensus and Marketing by: Organization Product Category	Absolute percent difference = $(\text{consensus forecast} - \text{value (reporting currency)} - \text{marketing forecast - value (reporting currency)}) / \text{consensus forecast} - \text{value (reporting currency)} \times 100$	Organization Product Category
Top Absolute % Difference (Currency) – Consensus and Sales by: Organization Product Category	Absolute percent difference = $(\text{consensus forecast} - \text{value (reporting currency)} - \text{sales forecast - value (reporting currency)}) / \text{consensus forecast} - \text{value (reporting currency)} \times 100$	Organization Product Category
Top Absolute % Difference (Currency) – Constrained and Budget by: Customer Item Organization Product Category	Absolute percent difference = $(\text{constrained forecast} - \text{value (reporting currency)} - \text{budget (reporting currency)}) / \text{constrained forecast} - \text{value (reporting currency)} \times 100$	Customer Item Organization Product Category
Top Actual Backlog by: Customer Item Organization Product Category	Actual Backlog	Customer Item Organization Product Category
Top Attained % by: Customer Item Organization	Booking history, consensus forecast	Customer Item Organization

Report Name	Measures or Facts	Dimension or View by
Top Budget Shortfall by Product Category	Constrained forecast cumulative value, budget cumulative value	Product Category
Top – Days of Cover by Item	PAB – days of cover	Item
Top Demand Fill % by: Customer Item Organization Product Category	Consensus forecast, shipment history, constrained forecast	Customer Item Organization Product Category
Top Demand Shortfall by item	Unmet demand – units (forecast)	Item
Top – Inventory Turns by: Item Organization Product Category	Inventory Turns	Item Organization Product Category
Top Inventory Value by: Item Organization Product Category	Projected available balance (PAB) – value (reporting currency)	Item Organization Product Category
Top - Production to Plan by: Item Product Category	Production history, production plan, production to plan	Item Product Category

Report Name	Measures or Facts	Dimension or View by
Top Projected Backlog by:	Projected Backlog	Customer
Customer		Item
Item		Organization
Organization		Product Category
Product Category		
Top – Resource Utilization	Required capacity, available capacity, net available capacity, resource utilization percent	Baseline scenario Resource Organization
Top – Resource Utilization by Organization	Required capacity, available capacity, net available capacity, resource utilization percent	Organization
Top Safety Stock by Item	Safety Stock	Item
Total Resource Utilization by Organization	Required capacity (table only), available capacity (table only), net available capacity, resource utilization percent	Organization
Top Unit Volume by:	Consensus forecast,	Customer
Customer	consensus forecast – value (reporting currency),	Item
Item	consensus forecast - cumulative	Organization
Organization		Product Category
Product Category		

My Open Activities

When you are logged on, the two seeded dashboards, the Supply Chain Analyst dashboard and the Sales & Operations Planning Analyst dashboard, display an alert in the top right of the page whenever overdue open activities exist. This is based on a seeded iBot that is tied to a report called **My Open Activities**. When you click the alert icon, the **My Open Activities** table displays a complete list of all open activities for which you are the primary or secondary owner.

When you click an activity name in the My Open Activities table, the activities table in the Scenario management user interface opens and displays all the details of the activity. In this location, you can update the status, owner, and other details of the activity.

See **Working with Activities** in Chapter 2 for an understanding of planning activities.

Using the Supply Chain Risk Management Dashboard

This chapter covers the following topics:

- Understanding the Supply Chain Risk Management Dashboard
- Using the Executive Review Page
- Understanding the Executive Review Page
- Profit Comparison
- Cost Analysis
- Revenue by Fiscal Period
- Margin by Fiscal Period
- Supply Demand KPI
- Inventory KPI
- Utilization KPI
- Strategic Plans
- Inventory Optimization Plans
- Using the Inventory Analysis Page
- Using the Supply Chain Sourcing Page
- Supply Chain Risk Management Secondary Drill-Down Reports

Understanding the Supply Chain Risk Management Dashboard

Due to the dynamic nature of the global business environment, companies are searching for ways to improve their supply chains in order to absorb disruptions that occur unexpectedly. While providing other substantial benefits, Just-in-time, and Lean Manufacturing initiatives have hindered many business's ability to absorb the impact of

unexpected events. Slack in the supply chain - usually in the form of inventory - is no longer available and a sudden change, such as a missed supply, can have an immediate impact on a company's operations.

We can all think of sensational events that have a major impact on business operations but a missed supplier shipment of a critical component can also impact operations. Plant strikes, a demand spike, and quality issues are other examples of events that can halt your supply chain. The business reality of today requires companies to manage risks.

Managing risk in your supply chain is a cyclical process involving risk identification, risk mitigation, and execution of your mitigation strategies. The Supply Chain Risk Management (SCRM) dashboard focuses on evaluating risk mitigation strategies.

SCRM analysis of various Risk Mitigation strategies can be scenario intensive where different options can be effectively evaluated. The Supply Chain Risk Analytics application provides the ability to collectively review and compare key metrics in a single interface providing true Enterprise Planning capabilities to the SCRM dashboard.

The table below, while not comprehensive, highlights some of the problems and questions that can be addressed with the SCRM dashboard.

Business Problem	What is the Risk?	Where is the Risk?	How do I mitigate the Risk?
Sudden demand change increase based on the updated consensus forecast	<ul style="list-style-type: none"> • Lower profitability and margins due to increased costs for expediting, overtime • Impact to customer service due to inability to meet demand 	<ul style="list-style-type: none"> • Transportation: Increase in costs due to expediting and overseas shipments • Manufacturing: Increased costs due to overtime • Customers: Which customers are affected? • Products: Which product lines are impacted? 	Subcontract additional manufacturing capabilities

Natural disaster resulting in supply chain disruption	<ul style="list-style-type: none"> • Lower revenue due to inability to meet demand • Inability to meet demand. • Margin impact due to increased costs for overtime and expediting 	<ul style="list-style-type: none"> • Manufacturing: Lost capacity at affected facility. Overtime at other facilities • Transportation: Increased expediting • Customers: Which customers are affected? 	Design of resilient supply chains by considering multiple sourcing options.
New product launch by competitor	<ul style="list-style-type: none"> • Lower revenue due to lost market share • Increased inventories due to lower demand 	<ul style="list-style-type: none"> • Customers: Which regions are affected and by how much? • Inventory: Which categories are affected? • Manufacturing: Lower utilization at plants 	Demand shaping with promotion, lower price, or introduce competing product
Unexpected loss in capacity due to plant shutdown, labor strike, or resource issue	<ul style="list-style-type: none"> • Lower revenue due to inability to meet demand • Inability to meet demand. • Margin impact due to increased costs for overtime and expediting 	<ul style="list-style-type: none"> • Manufacturing: Lost capacity at affected facility. Overtime at other facilities • Transportation: Increased expediting • Customers: Which customers are affected? 	<ul style="list-style-type: none"> • Contract excess capacity • Build in additional lines

Unexpected disruption in supply due to de-commit, quality, or other factors	<ul style="list-style-type: none"> • Impact to customer service due to inability to meet demand • Lower profitability due to lower revenue and higher costs 	<ul style="list-style-type: none"> • Supply: Higher costs due to premium supplies • Transportation: Increased costs due to expediting • Manufacturing: Higher manufacturing costs due to overtime for late supplies • Customers: Which customers are affected? 	<ul style="list-style-type: none"> • Dual/multi sourcing • Component substitution
Timing of new product launch	<ul style="list-style-type: none"> • Too early results in E&O • Too late results in loss of market share • Risk in margins, revenue 	<ul style="list-style-type: none"> • Inventory: Where is my inventory exposure if I launch early • Customers: Which customer regions are affected? 	Product timing balancing E&O with revenue/margins

Exposure based on probably demand ranges. For example: baseline, optimistic, pessimistic forecasts	<ul style="list-style-type: none"> Impact to margins if low/high forecast is met 	<ul style="list-style-type: none"> Inventory: What is my inventory exposure if pessimistic forecast is met 	<ul style="list-style-type: none"> Renegotiate supplier contracts to accommodate flex ranges
	<ul style="list-style-type: none"> Impact to customer service if high range is met 	<ul style="list-style-type: none"> Inventory: What are my shortages if my optimistic forecast is met Manufacturing: What is the effect on manufacturing for the pessimistic/optimistic forecast Transportation: Increase costs due to expediting Customer: What customers are affected? 	<ul style="list-style-type: none"> Contract additional manufacturing capacity for potential upside demand

The report pages leverage the flexibility of the Oracle Business Intelligence – Enterprise Edition (OBIEE), which enables the layout and content of the delivered reports to be changed by the user. The reports are organized in logical groupings as pages, or tabs, within the Supply Chain Risk Management Dashboard.

For details on how to use the OBI-EE features, see Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide.

These pages are available for the supply chain risk analyst:

- Executive Review.
- Inventory Analysis.
- Supply Chain Sourcing.
- Glossary.

The Glossary page provides:

- Definitions of all measures that are presented in the Supply Chain Risk Management Dashboard.
- Information about the logic used to calculate each measure.

Using the Executive Review Page

This section provides an overview of the Executive Review page and discusses:

- Profit Comparison.
- Cost Analysis.
- Revenue by Fiscal Period.
- Margin by Fiscal Period.
- Supply Demand KPI.
- Inventory KPI.
- Utilization KPI.
- Strategic Plans.
- Inventory Optimization Plans.

Understanding the Executive Review Page

The Executive Review page allows the risk analyst to quickly and efficiently evaluate the different scenarios across different metrics and KPI's. The goal is to understand the trade-offs of choosing one scenario over another so that compromises and risks are understood. For example, lower margins might be an acceptable trade-off compared for improved customer service or improved supply chain resiliency.

To access the Executive Review page:

1. Select the Supply Chain Risk Analyst responsibility.
2. Select Supply Chain Risk Management Dashboard.
3. Select the Executive Review tab.

Page-Level Filters

Page-level filters are provided at the top of the Executive Review page. Page-level filters are used to filter the results of the work areas.

This table lists the page level filters for the Executive Review page:

Filter	Description
Comparison Scenario	Select from a list of scenarios by which to compare to a baseline scenario. This is a required field.
Baseline Scenario	Select from a list of scenarios to be used as the baseline. Only one scenario can be selected. This is a required field.
Fiscal Year	Select from a list of fiscal years. Multiple years can be selected. This is an optional field.
Category	Select from a list of item categories. Only one category can be selected. This is an optional field.

Profit Comparison

This report shows Total Revenue, Total Cost, Gross Margin, Revenue and Margin Difference across the baseline and comparison scenarios. Values displayed are calculated as follows:

- Total Revenue from expected sales is equal to the sum of (Independent demand quantity * (list price - discount)).
- Total (Supply Chain) Cost is the sum of manufacturing, purchasing, transportation, fixed cost, startup & shutdown, and carrying costs in reporting currency.
- Gross Margin is the difference between Total Revenue and Total Cost.

The difference values are the difference between the comparison scenarios and the baseline scenario.

Additional reports that you can access from the Profit Comparison report are (in alphabetical order):

- Margin by Fiscal Period.
- Margin by Organization.
- Revenue by Customer.
- Revenue by Fulfillment Organization.

- Revenue by Organization.
- Supply Value by Category.
- Supply Value by Item.
- Supply Value by Source Organization.

Cost Analysis

This report provides an overall cost breakdown of the different cost types across scenarios and can be used to quickly identify the cost drivers for a given scenario. Total Cost Difference provides a quick summary of the cost difference between the comparison and baseline scenarios and drill-downs from this column provides additional cost differences by type.

Fixed costs, Shutdown and Startup Costs are costs that can be modeled in Oracle Strategic Network Optimization (SNO) for network design and analysis.

Fixed costs are period-specific fixed operating costs for an organization. Startup costs is the cost for starting up a facility, and shutdown cost is the cost of shutting down a facility and can often be a benefit due to the sale of the organization assets. If this value is negative, it represents a net inflow (benefit) of capital.

The View option above the chart allows you to display the report information by Cost Breakdown or Total Cost.

Additional reports that you can access from the Cost Analysis report are (in alphabetical order):

- Carrying Cost by Category.
- Carrying Cost by Fiscal Period.
- Carrying Cost by Item.
- Carrying Cost by Organization.
- Cost by Resource.
- Fixed Cost by Organization.
- Fixed Cost by Period.
- Manufacturing Cost by Fiscal Period.
- Manufacturing Cost by Organization.
- Purchasing Cost by Category.

- Purchasing Cost by Fiscal Period.
- Purchasing Cost by Item.
- Purchasing Cost by Organization.
- Purchasing Cost by Supplier.
- Shutdown/Startup Cost by Period.
- Startup/Shutdown Cost by Organization.
- Transportation Cost by Fiscal Period.
- Transportation Cost by Lane.
- Transportation Cost by Ship Method.

Revenue by Fiscal Period

This report shows revenue over time across the baseline and comparison scenarios and is useful for highlighting revenue risk across scenarios such as significant revenue fluctuations which may have a material impact on the business.

The View option above the chart allows you to display report information in a Revenue Chart or Revenue Table.

Additional reports that you can access from the Revenue by Fiscal Period report are (in alphabetical order):

- Revenue by Category.
- Revenue by Customer.
- Revenue by Item.
- Revenue by Organization.

Margin by Fiscal Period

This report shows margin over time across the baseline and comparison scenarios and is useful for highlighting profitably risk when modeling risk events in the various scenarios.

The View option allows you to display the report in a margin chart or margin table.

Additional reports that you can access from the Margin by Fiscal Period report are (in alphabetical order):

- Margin by Organization.

Supply Demand KPI

This is a summary of the key supply and demand Key Performance Indicators across scenarios.

Additional reports that you can access from the Supply Demand KPI report are (in alphabetical order):

- Consensus Forecast by Fiscal Period.
- Constrained Forecast by Fiscal Period.
- Total Demand by Category.
- Total Demand by Customer.
- Total Demand by Fiscal Period.
- Total Demand by Item.
- Total Supply by Category.
- Total Supply by Fiscal Period.
- Total Supply by Item.
- Unmet Revenue by Category.
- Unmet Revenue by Customer.
- Unmet Revenue by Fiscal Period.
- Unmet Revenue by Item.

Inventory KPI

Key inventory KPI values appear in this report and are useful when leveraging Inventory Optimization (IO) to define optimal safety stock policies in concert with network design Decisions in Strategic Network Optimization (SNO).

Utilization KPI

This report provides a high level summary of resource and supplier utilization. Supplier utilization is relevant if supplier capacities are constrained.

Additional reports that you can access from the Utilization KPI report are (in alphabetical order):

- Resource Utilization by Fiscal Period.
- Resource Utilization by Organization.
- Resource Utilization by Resource.
- Supplier Utilization by Fiscal Period.
- Top Supplier Item Utilization.

Strategic Plans

This report displays Strategic Network Optimization (SNO) plans based on the selected Baseline and Comparison scenarios. The plan names represent links that allow you to access the SNO workbench to view the plan for further analysis. When opening the SNO plan, only the base model is loaded and not the specific scenario.

Inventory Optimization Plans

This report displays Inventory Optimization (IO) plans for the selected scenarios. The plan names represent links that allow you to access the IO Analysis workbench to view the plan for further analysis.

Using the Inventory Analysis Page

This section provides an overview of the Inventory Analysis page and discusses:

- Cost Analysis.
- Network and Inventory Summary.
- Postponement Analysis.
- Excess and Obsolescence.
- Safety Stock Scenario Analysis.
- Inventory Analysis.
- Service Level Scenario Comparison.
- Unmet Revenue Analysis.

Understanding the Inventory Analysis Page

In most cases risk in the supply chain manifests itself as inventory. For this reason, a dedicated page for inventory analysis will be provided to allow for inventory comparisons across scenarios. This page can be used to analyze the risk of different network design alternatives in your supply chain taking into consideration the impacts of variability and its affect on inventory. Postponement strategies can also be evaluated for different network design scenarios, providing a measure of risk that can be evaluated. This page can help answer questions such as:

- What is the appropriate number and location of distribution facilities?
- What postponement strategies should be employed, and where?
- In what form should inventory be held to protect against uncertainty?
- How could I react to a disruption in supply due to unforeseen events?
- What is the impact of mergers and acquisitions on my supply network?

To access the Inventory Analysis page:

1. Select the Supply Chain Risk Analyst responsibility.
2. Select Supply Chain Risk Management Dashboard.
3. Select the Inventory Analysis tab.

Page-Level Filters

Page-level filters are provided at the top of the Inventory Analysis page. Page level filters are used to filter the results of the work areas.

The table below lists the page-level filters for the Inventory Analysis page.

Filter	Description
Comparison Scenario	Select from a list of scenarios by which to compare to a baseline scenario. This is a required field.
Baseline Scenario	Select from a list of scenarios to be used as the baseline. Only one scenario can be selected. This is a required field.

Filter	Description
Fiscal Year	Select from a list of fiscal years. Multiple years can be selected. This is an optional field.
Category	Select from a list of item categories. Only one category can be selected. This is an optional field.

Cost Analysis

This report provides an overall cost breakdown of the different cost types across scenarios and can be used to quickly identify the cost drivers for a given scenario. Total Cost Difference provides a quick summary of the cost difference between the comparison and baseline scenarios and drill-downs from this column provides additional cost differences by type.

Fixed costs, Shutdown and Startup Costs are costs that can be modeled in Oracle Strategic Network Optimization (SNO) for network design and analysis.

Fixed costs are period-specific fixed operating costs for an organization. Startup costs is the cost for starting up a facility, and shutdown cost is the cost of shutting down a facility and can often be a benefit due to the sale of the organization assets. If this value is negative, it represents a net inflow (benefit) of capital.

The View option above the chart allows you to display the report information by Cost Breakdown or Total Cost.

Additional reports that you can access from the Cost Analysis report are (in alphabetical order):

- Carrying Cost by Category.
- Carrying Cost by Fiscal Period.
- Carrying Cost by Item.
- Carrying Cost by Organization.
- Cost by Resource.
- Fixed Cost by Organization.
- Fixed Cost by Period.
- Manufacturing Cost by Fiscal Period.

- Manufacturing Cost by Organization.
- Purchasing Cost by Category.
- Purchasing Cost by Fiscal Period.
- Purchasing Cost by Item.
- Purchasing Cost by Organization.
- Purchasing Cost by Supplier.
- Shutdown/Startup Cost by Period.
- Startup/Shutdown Cost by Organization.
- Transportation Cost by Fiscal Period
- Transportation Cost by Lane.
- Transportation Cost by Ship Method.

Network and Inventory Summary

This report provides a summary of network and inventory Key Performance Indicators and is useful when holistically designing your supply chain network taking into account the number and location of facilities in conjunction with the impacts to your inventory policies. The intent is to analyze scenarios where Strategic Network Optimization and Inventory Optimization are used in concert.

The number of items Single Sourced is a useful risk metric that reports on the number of items that have only one source for a given organization. A higher number indicates an increased risk in your supply chain

Additional reports that you can access from the Network and Inventory Summary report are (in alphabetical order):

- Inventory Turns by ABC Class.
- Inventory Value by Category-Organization.
- Items Single Sourced.
- Single Source Count by Category.
- Single Source Count by Organization.
- Top – Days of Cover by Item.

This report allows you to view data based in selected View, Category, or Organization.

Postponement Analysis

This report is primarily used when incorporating Inventory Optimization in your scenarios and quantifies the impact of inventory postponement in both inventory carrying cost and safety stock. A higher degree of postponement indicates lower overall inventory risk.

Fact Notes

All facts represent dollar values.

Carrying Cost Savings = Carrying Cost without Postponement – Carrying Cost

Safety Stock Savings = Safety Stock without Postponement – Safety Stock Value

The report allows you to view information based on the selected View. The available options are view by Table or Chart.

Additional reports that you can access from the Postponement Analysis report are (in alphabetical order):

- Postponement by Organization.

This report allows you to view data based in selected View, Category, or Organization.

Excess and Obsolescence

This is summary report indicates the potential amount of excess or obsolete components and is a good measure of inventory risk.

The reports allow you to view information based on the selected View. The available options are view by Category or Organization.

The Total Excess Value is computed as:

Total Excess * Item Standard Cost

Where Total Excess includes excess on hand plus excess on order. Excess on hand is the difference between On-Hand Inventory and Demand within the Excess Horizon and Excess On-Order is the difference between On-Order Inventory and Demand within Excess Horizon.

The Total Obsolescence Value is computed as:

Total Obsolete * Item Standard Cost

Where Total Obsolete includes obsolete on hand plus obsolete on order. Obsolete on hand is the difference between On-Hand Inventory and Demand within Obsolescence Horizon and Obsolete On-Order is the difference between On-Order Inventory and

Demand within Obsolescence Horizon.

Additional reports that you can access from the Excess and Obsolescence report are (in alphabetical order):

- Excess Details.
- Obsolescence Details.

Safety Stock Scenario Analysis

This report provides the ability to compare safety stock by category, organization, or period across the various scenarios.

The View list provides the following options for the report data to be displayed:

- Safety Stock by Category.
- Safety Stock by Fiscal Period.
- Safety Stock by Organization.

Additional reports that you can access from the Safety Stock Scenario Analysis report are (in alphabetical order):

- Comparison of Inventory and Safety Stock.

Inventory Analysis

This report allows you to compare the projected available balance against the safety stock targets for each scenario.

The View selector provides the following options:

- Safety Stock Target Analysis.
- Safety Stock Target Analysis – Value.

The Scenario selector allows you to choose which scenario data to view.

Additional reports that you can access from the Inventory Analysis report are (in alphabetical order):

- Comparison of Inventory and Safety Stock

Ratio is calculated as follows:

Ratio= Inventory Days of Cover / Safety Stock in Days

Service Level Scenario Comparison

This report provides a summary of the service level shortfall by customer, period, and category or demand class and can be used in gauging customer service risk.

Service level difference is calculated as follows:

Service Level Difference = Service Level – Target Service Level.

Additional reports that you can access from the Service Level Scenario Comparison report are (in alphabetical order):

- Service Level Difference by Category.
- Service Level Difference by Fiscal Period-Category.
- Service Level Difference by Fiscal Period-Customer.
- Service Level Difference by Item.
- Top Service Level Difference by Customer.

Unmet Revenue Analysis

The magnitude of unmet revenue by customer, category, or fiscal period can be compared across scenarios to identify the largest shortfall of revenue across these different dimensions. With this knowledge, actions can be taken to mitigate revenue risk.

Additional reports that you can access from the Unmet Revenue Analysis report are (in alphabetical order):

- Top Unmet Revenue by Customer.
- Unmet Revenue by Category.
- Unmet Revenue by Fiscal Period-Category.
- Unmet Revenue by Fiscal Period-Customer.
- Unmet Revenue by Item.

Using the Supply Chain Sourcing Page

This section provides an overview of the Supply Chain Sourcing page and discusses:

- Supplier Sourcing.
- Manufacturing Sourcing.

- Transportation by Mode.

Understanding the Supply Chain Sourcing Page

The Supply Chain Sourcing page allows the Supply Chain Risk Analyst the ability to compare supply, manufacturing, and transportation sourcing between two scenarios. To be able to compare the scenarios effectively, we limit the choice to two scenarios.

To access the Supply Chain Sourcing page:

1. Select the Supply Chain Risk Analyst responsibility.
2. Select Supply Chain Risk Management Dashboard.
3. Select the Supply Chain Sourcing tab.

Page-Level Filters

Page-level filters are provided at the top of the Supply Chain Sourcing page. Page level filters are used to filter the results of the work areas.

The table below lists the page-level filters for the Supply Chain Sourcing page.

Filter	Description
Comparison Scenario	Select from a list of scenarios by which to compare to a baseline scenario. This is a required field.
Baseline Scenario	Select from a list of scenarios to be used as the baseline. Only one scenario can be selected. This is a required field.
Fiscal Year	Select from a list of fiscal years. Multiple years can be selected. This is an optional field.
Category	Select from a list of item categories. Only one category can be selected. This is an optional field.

Supplier Sourcing

Supplier sourcing can be compared across different scenarios to analyze overall distribution of purchasing dollars across suppliers and can provide visibility to highlight an unbalance allocation of supplies across suppliers.

Table and chart views allow you to view the supply distribution by supplier.

Additional reports that can be accessed from the Supplier Sourcing reports are (in alphabetical order):

- Purchasing Cost by Category.
- Purchasing Cost by Fiscal Period.

Manufacturing Sourcing

Manufacturing sourcing can be compared across the different scenarios to analyze the overall manufacturing cost distribution across the different organizations.

Table and chart views allow you to compare the manufacturing sourcing by plant for each scenario.

Additional reports that can be accessed from the Manufacturing Sourcing reports are (in alphabetical order):

- Manufacturing Volume by Category.
- Manufacturing Volume by Fiscal Period.

Transportation by Mode

Comparison of transportation modes can be analyzed in this report to assess the amount of transportation dollars allocated to a specific mode.

Table and chart views allow you to compare the transportation cost by mode for each scenario.

Additional reports that can be accessed from the Transportation by Mode reports are (in alphabetical order):

- Transportation by Category.
- Transportation by Source-Destination.
- Transportation Cost by Item.

Supply Chain Risk Management Secondary Drill-Down Reports

Primary reports are located on the three tabs in the Supply Chain Risk Management Dashboard. Secondary reports are reports that you access from the primary reports.

The table below list secondary reports for the Supply Chain Risk Management Dashboard in alphabetical order.

Report Name	Measures or Facts	Dimension or View by
Carrying Cost by Category	Carrying Cost	Scenario, Fiscal Period
Carrying Cost by Fiscal Period	Carrying Cost	Scenario, Fiscal Period
Carrying Cost by Item	Carrying Cost	Scenario, Fiscal Period
Carrying Cost by Organization	Carrying Cost	Scenario, Fiscal Period
Comparison of Inventory and Safety Stock by Category	Inventory Value, Inventory Days of Cover, Inventory Quantity, Safety Stock (units), Safety Stock (Days), Ratio (Inventory Days of Cover / Safety Stock in Days)	Category
Comparison of Inventory and Safety Stock by Organization	Inventory Value, Inventory Days of Cover, Inventory Quantity, Safety Stock (units), Safety Stock (Days), Ratio (Inventory Days of Cover / Safety Stock in Days)	Organization
Consensus Forecast by Fiscal Period	Consensus Forecast	Fiscal Period
Constrained Forecast by Fiscal Period	Constrained Forecast	Fiscal Period
Cost by Resource	Resource Cost	Resource
Excess Details by Category	On Hand, On Order, Demand within Excess Horizon, Excess On Hand, Excess On Order, Total Excess, Excess On Order (value), Excess On Order (value), Total Excess (value)	Category

Excess Details by Organization	On Hand, On Order, Demand within Excess Horizon, Excess On Hand, Excess On Order, Total Excess, Excess On Order (value), Excess On Order (value), Total Excess (value)	Organization
Fixed Cost by Organization	Fixed Cost	Organization
Fixed Cost by Period	Fixed Cost	Fiscal Period
Inventory Turns by ABC Class	Inventory Turns	Item
Inventory Value by Category	Inventory Value	Category
Inventory Value by Organization	Inventory Value	Organization
Items Single Sourced	Order Quantity	Item
Manufacturing Cost by Fiscal Period	Manufacturing Cost	Fiscal Period
Manufacturing Cost by Organization	Manufacturing Cost	Organization
Manufacturing Volume by Category	Manufacturing Volume	Category
Manufacturing Volume by Fiscal Period	Manufacturing Volume	Fiscal Period
Margin by Fiscal Period	Margin	Fiscal Period
Margin by Organization	Margin	Organization
Obsolescence Details by Category	On Hand, On Order, Demand within Obsolescence Horizon, Obsolete On Hand (value), obsolete on-order (value), Total Obsolescence (Value)	Category

Obsolescence Details by Organization	On Hand, On Order, Demand within Obsolescence Horizon, Obsolete On Hand (value), obsolete on-order (value), Total Obsolescence (Value)	Organization
Postponement by Category	Carrying Cost, Carrying Cost without Postponement, Safety Stock, Safety Stock without Postponement, Carrying Cost Savings, Safety Stock Savings	Category
Postponement by Organization	Carrying Cost, Carrying Cost without Postponement, Safety Stock, Safety Stock without Postponement, Carrying Cost Savings, Safety Stock Savings	Organization
Purchasing Cost by Category	Purchasing Cost	Category
Purchasing Cost by Fiscal Period	Purchasing Cost	Fiscal Period
Purchasing Cost by Item	Purchasing Cost	Item
Purchasing Cost by Organization	Purchasing Cost	Organization
Purchasing Cost by Supplier	Purchasing Cost	Supplier
Resource Utilization by Fiscal Period	Resource Utilization	Fiscal Period
Resource Utilization by Organization	Resource Utilization	Organization
Resource Utilization by Resource	Resource Utilization	Resource
Revenue by Category	Revenue	Category
Revenue by Customer	Revenue	Customer

Revenue by Fulfillment Organization	Revenue	Fulfillment Organization
Revenue by Item	Revenue	Item
Revenue by Organization	Revenue	Organization
Service Level Difference by Category	Service Level Difference	Category
Service Level Difference by Fiscal Period-Category	Service Level Difference	Category, Fiscal Period
Service Level Difference by Fiscal Period-Customer	Service Level Difference	Customer, Fiscal Period
Service Level Difference by Item	Service Level Difference	Item
Shutdown/Startup Cost by Period	Shutdown/Startup Cost	Fiscal Period
Single Source Count by Category	Number of Items Single Sourced	Category
Single Source Count by Organization	Number of Items Single Sourced	Organization
Startup/Shutdown Cost by Organization	Startup/Shutdown Cost	Organization
Supplier Utilization by Fiscal Period	Supplier Utilization	Fiscal Period
Supply Value by Category	Supply Value	Category
Supply Value by Item	Supply Value	Item
Supply Value by Source Organization	Supply Value	Source Organization
Top – Days of Cover by Item	Days of Cover	Item

Top Service Level Difference by Customer	Service Level Difference	Customer
Top Supplier Item Utilization	Supplier Utilization	Scenario, Customer
Top Unmet Revenue by Customer	Unmet Revenue	Customer
Total Demand by Category	Total Demand	Category
Total Demand by Customer	Total Demand	Customer
Total Demand by Fiscal Period	Total Demand	Fiscal Period
Total Demand by Item	Total Demand	Item
Total Supply by Category	Total Supply	Category
Total Supply by Fiscal Period	Total Supply	Fiscal Period
Total Supply by Item	Total Supply	Item
Transportation by Category	Transportation Cost	Category
Transportation by Source-Destination	Transportation Cost	Source-Destination
Transportation Cost by Fiscal Period	Transportation Cost	Fiscal Period
Transportation Cost by Item	Transportation Cost	Item
Transportation Cost by Lane	Transportation Cost	Lane
Transportation Cost by Ship Method	Transportation Cost	Ship Method
Unmet Revenue by Category	Unmet Revenue	Category
Unmet Revenue by Customer	Unmet Revenue	Customer

Unmet Revenue by Fiscal Period	Unmet Revenue	Fiscal Period
Unmet Revenue by Fiscal Period-Category	Unmet Revenue	Category, Fiscal Period
Unmet Revenue by Fiscal Period-Customer	Unmet Revenue	Customer, Fiscal Period
Unmet Revenue by Item	Unmet Revenue	Item

Using the Service Parts Planning Dashboard

This chapter covers the following topics:

- Overview
- Using the Plan Health Summary Page
- Using the Demand & Supply Page
- Using the Exceptions Page
- Using the Service Level Agreement Analysis Page
- Using the Historical Performance Page

Overview

The Service Parts Planning (SPP) dashboard helps a Service Parts Planner review his service supply chain, monitor the plan performance, and identify potential issues, cutting across planning applications. Pre-seeded Service Parts Planning reports are available with the role of 'Service Parts Analyst'. The reports enable tasks related to service parts plan analysis, and their layout and content may be changed by the user.

These reports, and glossary information, are available in the following tabs:

- Plan Health Summary
- Demand and Supply
- Exceptions
- SLA Analysis
- Historical Performance

Using the Plan Health Summary Page

This page provides the Supply Chain Analyst an overall view of the plan's health. Key metrics are displayed regarding demand and supply, resources, and exceptions. This page also provides the ability to compare an archived plan against actuals, and against a current plan.

Page level Filters


The following page level filters are provided:

Baseline Plan	A drop down with a list of plans to be used as the baseline. Only one selection is allowed.
Comparison Plan	A drop down with a list of plans from which the archived plan may be selected. Multiple plans may be selected from this list
Category	A drop down with a list of Categories. Multiple categories may be selected from this list
Organization	A drop down with a list of Organizations. Multiple organizations may be selected from this list
Period Start	Ability to select the date range of choice over which the reports should be displayed.

Demand and Supply Summary Report

This report helps users to determine how demand and supply differ between baseline and comparison plans. One example would be to determine what has changed since the previous month. Both Usable and Defective supplies are shown.

The rows 'Total Demand Difference', 'Total Usable Supply Difference' and 'Total Defective Supply Difference' rows are computed as a percentage: (Baseline Plan Value minus Archived Plan Value) / (Archived Plan Value). The table allows drilling down to relevant reports from the Plan Value (described below).

 Demand and Supply Summary		
Planner J. Smith		
	00spp07 01/06 (0)	00spp06 01/06 (0)
Total Demand	6,374	6,769
Sales Orders	582	982
Forecast	1,568	872
Dependent Demand	4,224	4,915
Total Usable Supply	8,049	5,721
Onhand - Usable	1,037	611
In-Transit - Usable	324	255
Purchase order	1,039	1,039
External Repair Order	0	0
Internal Repair Order	0	0
Repair Work Order-External Repair Supplier	0	0
Repair Work Order-Internal Depot Org	0	0
Planned New Buy Order	1,243	1,272
Planned External Repair Order	248	214
Planned Internal Repair Order	248	405
Planned Repair Work Order	3,086	2,249
Planned Transfers - Usable	919	686
Total Defective Supply	3,108	3,754
Onhand - Defective	572	1,442
In-Transit - Defective	630	4,934
Returns Forecast	248	233
Planned Transfers - Defective	2,349	3,247
Total Demand Difference	-75%	-73%
Total Usable Supply Difference	-74%	-81%
Total Defective Supply Difference	-79%	-75%
Projected Fill Rate	150	150
Projected Inventory turns	0	0

Drill-downs

The report Demand and Supply Summary Report provides the following drill-downs.

Demand & Supply Totals by Category

Category (Inv.Items)	Sales Orders	Forecast	Dependent Demand	Total Demand	Onhand - Usable	Transfers - Usable	Internal Repairs	External Repairs	New Buy	Total Usable Supply	Onhand - Defective	Transfers - Defective	Returns	Total Defective Supply
AIRCRAFT.AIRCRAFT		2,293	1560.00	3,853	346	538	1,002	1,725	120	6,229	2,602	1,519	0	1,792
AIRCRAFT.COMPONENT		588	4931.00	5,519	238	97	3,445	719	282	677	243	1,291	0	377
AIRCRAFT.ENGINE		1,590	2129.00	3,719	172	1,085	833	1,785	1,661	5,243	256	1,168	0	1,528
AUTOMOTIVE.BODY		582	1855.00	2,685		0	234	957	957			0	740	
AUTOMOTIVE.BRAKES		364	2010.00	2,374	23	0	1,791	1,543	1,521	376	145	163	0	366
AUTOMOTIVE.TIRE		0	1474.00	2,056	771	1,243	1,543	1,543	348	7,191	387	2,327	248	2,606
CIRCUIT.MISC		1,204	740.00	1,944	243	0	0	248	413	482	40	489	0	136
NEW.MISC		0	2900.00	2,900		375	1,250	1,225	0	10,424	202	1,259	25,991	8,048

Plan is equal to 00app07 01/06(0)

This provides the following:

- Ability to drill down from Totals field
- Ability to select multiple categories using the dropdown containing the list of categories.
- Transfers include In-transits and Planned Transfers
- Repairs include existing repair orders and Planned Repair orders, both internal and external
- New Buy includes existing Purchase Orders and Planned New Buy Orders
- Category TOTAL is a computed field. It is okay to sum across multiple UOM's within the Category.
- In case of multiple Categories, pagination is applied, 25 lines per page. The Category TOTAL is displayed each page.

Demand & Supply Totals by Organization

Organization Code	Organization Code	Sales Orders	Forecast	Dependent Demand	Total Demand	Onhand - Usable	Transfers - Usable	Internal Repairs	External Repairs	New Buy	Total Usable Supply	Onhand - Defective	Transfers - Defective	Returns	Total Defective Supply
MA2.D2	MA2.D2		582	2655.00	3,485		375	634	1,582	957	8,476		753	740	7,458
MA2.DFW	MA2.DFW		2,293	1560.00	3,853	346	538	1,002	1,725	120	6,229	2,602	1,519	0	1,792
MA2.DWH	MA2.DWH		0	900.00	900		0	0	0	0	822	101	0	25,991	368
MA2.M1	MA2.M1		0	1200.00	1,200		0	850	600	0	1,126	101	506	0	222
MA2.M2	MA2.M2		364	2010.00	2,374	Results	0	1,791	1,543	1,521	376	145	163	0	366
MA2.M3	MA2.M3		0	0.00	1,200	101	229	600	400	104	1,963		0	0	963
MA2.PM	MA2.PM		588	4931.00	5,519	238	97	3,445	719	282	677	243	1,291	0	377
MA2.SFM	MA2.SFM		1,590	2129.00	3,719	172	1,085	833	1,785	1,661	5,243	256	1,168	0	1,528
MA2.V1	MA2.V1		0	1474.00	2,056	771	1,243	1,543	1,543	348	7,191	387	2,327	248	2,606
MAA.V1	MAA.V1		1,204	740.00	1,944	243	0	0	248	413	482	40	489	0	136

Plan is equal to 00app07 01/06(0)

This provides the following:

- Ability to drill down from Totals field
- Ability to select multiple organizations using the dropdown containing the list of categories.

- Transfers include In-transits and Planned Transfers
- Repairs include existing repair orders and Planned Repair orders, both internal and external
- New Buy includes existing Purchase Orders and Planned New Buy Orders
- Organization TOTAL is a computed field. It is okay to sum across multiple UOM's within the Organization.
- In case of multiple Categories, pagination is applied, 25 lines per page. The Category TOTAL is displayed on each page.

Demand & Supply Trend

This report provides the planner the ability to compare measures within a given plan. This can be useful in a number of ways, for example, to compare how demand compares with supply in each period, to see how the supply is composed (by comparing total supply against repairs, purchases, and so on). The planner is able to select multiple measures by means of a multi select, and the graph plots for the selected measures over time.

This is the same as the Demand & Supply Trend- Base Plan report in Demand & Supply page. While that report permits the user to select multiple measures, then drilling down from there, this report opens with all measures selected.

Top Demands

This report shows the user the top categories / zones / organizations / supersession with the highest demands.

This is similar to the 'Top Demand' report in the Demand & Supply Page but opens in the context of the filters applied on the parent report. It can be viewed along Category, Organization and Zone dimensions.

Top Supplies

This report shows the top categories / zones / organizations / supersession with the highest supplies.

This is the similar to the 'Top Supplies' report in the Demand & Supply Page but opens in the context of the filters applied on the parent report. It can be viewed along Category and Organization dimensions.

Top Returns

This report shows the user the top categories / zones / organizations / supersession with the highest returns.

This is the similar to the 'Top Returns' report in the Demand & Supply Page but opens in the context of the filters applied on the parent report. It can be viewed along Category, Organization, and Zone Dimensions.

Top Repairs

This shows the user the top categories / zones / organizations / supersession with highest repairs.

This is similar to the 'Top Repairs' report in the Demand & Supply Page but opens in the context of the filters applied on the parent report. It can be viewed along Category and Organization dimensions.

Exceptions Summary


This is similar to the 'Exceptions Summary, page 8-29' report in the 'Exceptions' page. The report opens in the context of the filters applied on the 'Demand & Supply Summary' parent report.

Safety stock versus PAB Trend



This compares safety stock against the Projected Available Balance over time.

Safety stock versus PAB by Category



Safety Stock Versus PAB by Category

00spp06 01/06(0)

Category (Inv.Items)	Safety Stock	PAB - Units
AUTOMOTIVE.BRAKES		574

Plan is equal to 00spp06 01/06(0)
and Manufacturing Period Start Date is equal to 10/12/2009 12:00:00 AM
and Planner is equal to J. Smith

This compares safety stock and PAB, grouped by category.

Safety stock versus PAB by Organization



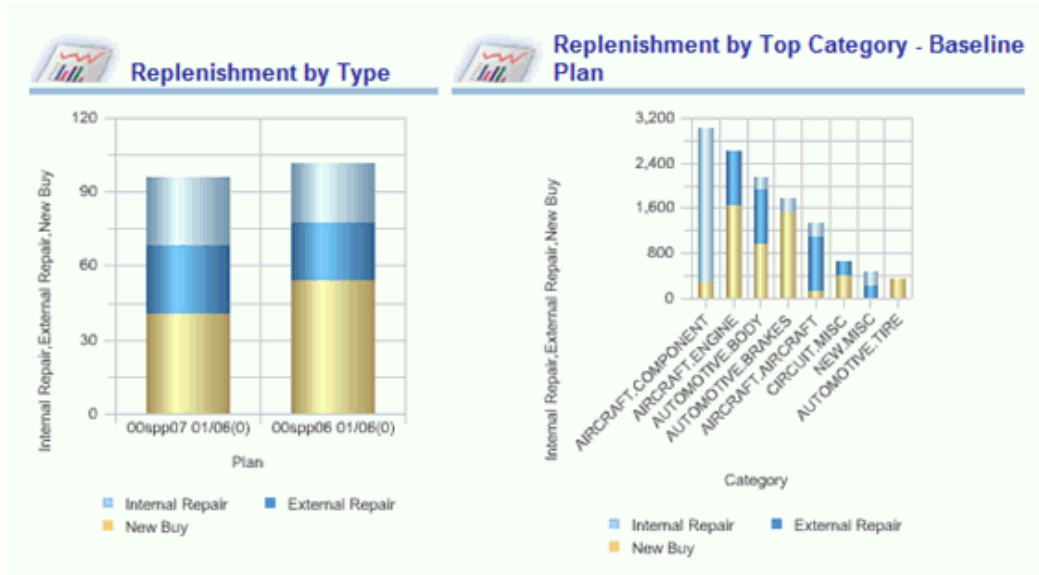
This compares safety stock and PAB, grouped by organization.

Safety stock versus PAB by Supersession Chain

This compares safety stock and PAB, grouped by supersession chain.

Replenishment by Type Report

Repair vs. buy is one of the key decisions that a service parts planner has to make. This report graphically shows the planner what percentage of replenishments are met through repairs versus new parts. Within repairs, it shows how much is repaired by internal repair depots versus third party repair suppliers. A second graph shows the split between the all three sources, by category.



Drill-downs

The following drill-down reports are available from the Replenishment By Type Report:

Demand & Supply Totals by Category

This report is identical to the Demand & Supply totals by Category drill-down from Demand & Supply Summary report but opens in the context of the filters applied on the parent report. It is possible to drill down from both the archived plan and the baseline plan

Demand & Supply Totals by Organization

This report is identical to the Demand & Supply Totals by Organization drill-down from Demand & Supply Summary report but opens in the context of the filters applied on the parent report. It possible to drill down from both the archived plan and the baseline plan.

Demand & Supply Totals Trend

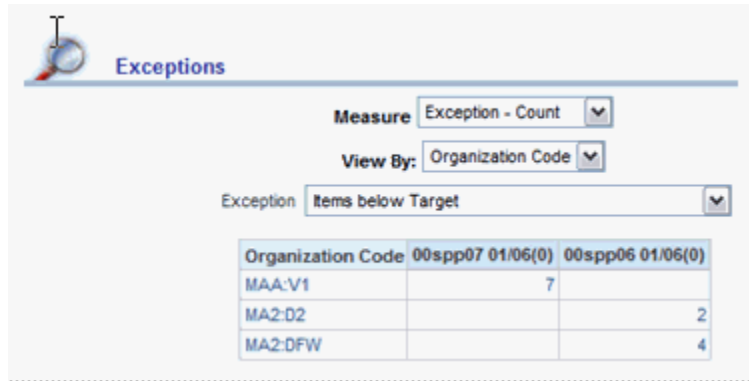
This is identical to the Demand & Supply Trend report in Demand & Supply page but opens in the context of the filters applied on the parent report. While that report permits the user to select multiple measures, when drilling down from here the report opens with all measures selected. Also, the table, (and not the graph) opens up when the planner drills down from here. This drill-down is available both for the Archived and the Baseline plan.

Top Repairs

This is similar to the 'Top Repairs' report in the Demand & Supply Page but opens in the context of the filters applied on the parent report. It is viewable along Category, and Organization dimensions.

Exceptions Report

Since the first thing a planner usually does while reviewing a plan is to look at the exceptions in the plan, the Exceptions Report is included in the Plan Health page. This report helps the planner analyze exceptions in the Baseline plan and compare them with those in other plans.



Organization Code	00spp07 01/06(0)	00spp06 01/06(0)
MAA:V1	7	
MA2:D2		2
MA2:DFW		4

The user can filter the table across the following dimensions in addition to the page level filters:

- **Exception Type** Ability to select multiple exception types using the drop down containing the list of exception types.
- **Measure:** Ability to select one of the exceptions facts as the measure to be displayed in the table. The measures include: Exception Count, Exception Value, Exception Days, Exception Quantity, and Exception Ratio

The table provides the following:

- Ability to drill down to relevant reports (described below) from the Plan Value
- Note that this report is a mixed report in that some of the exceptions are in Dollars (\$), some in Quantity, Some as Ratio and others as Count or Days. The appropriate format should be followed as shown in the table above.
- Pagination should be applied if required. A maximum of 25 lines per page should be displayed

The 'Exception' drop down contains all exceptions in an SPP plan and the planner can select one from the list to compare the two plans against.

In case there are multiple measures for an exception – for example, Safety stock exceptions can be measured in quantity or days – the Measure drop down would have a list of values that the planner can select from.


The planner has the ability to view the exceptions in the plan along different dimensions – Supersession chain, Category and Organization

Drill-downs

The following drill-down reports, defined above, are available from the Exceptions Report:

Exceptions by Category

This report helps users analyze exceptions by Category in the plan that he drills down from.




Measure:	Exception - Count	▼
Plan	Category	Exception - Count
CS-SP-1 02/01(0)	NEW.MISC	132

[Return](#) - [Create Bookmark Link](#)

Exceptions by Organization

This report helps users analyze exceptions by Organization in the Baseline Plan and also compare exceptions between the Baseline and Comparison Plans.



Measure:	Exception - Quantity	▼
Plan	Organization	Exception - Quantity
CS-SP-1 02/01(0)	SLC:M2	2

[Return](#) - [Create Bookmark Link](#)

Exceptions by Supersession

The layout of this report is similar to the Exceptions by Category report, except that this report permits filtering, and opens by supersession chain.

Exceptions Trend

The Exceptions Trend graph plots the selected exception along the time dimension. This can be viewed either as a graph or as a table.



The table provides the ability to drill down to the same reports as in the chart.

Exceptions Trend
Time run: 10/9/2008 9:16:36 AM

Plan is equal to 1Daily 09/10(4)
and Exception Type is equal to Late replenishment for forecast

Measure: Exception - Count

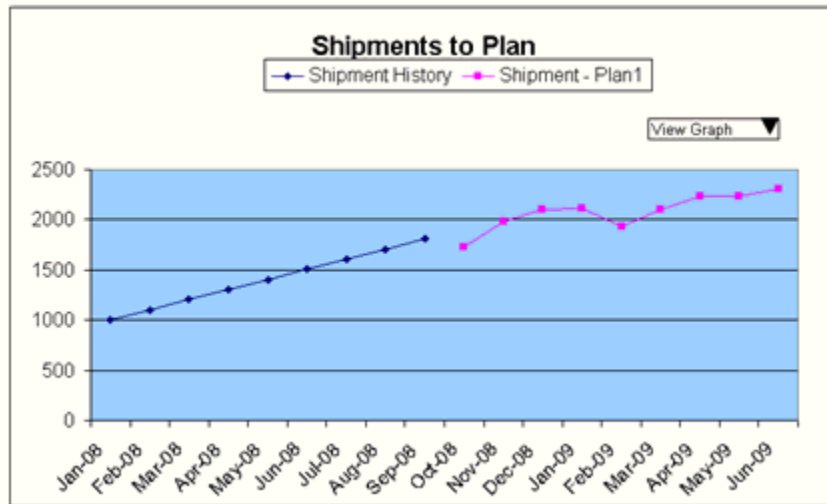
Plan	Period Start Date	Exception Type	Exception - Count
1Daily 09/10(4)	09/15/2008	Late replenishment for forecast	16
1Daily 09/10(4)	01/12/2009	Late replenishment for forecast	9
1Daily 09/10(4)	02/09/2009	Late replenishment for forecast	10
1Daily 09/10(4)	03/16/2009	Late replenishment for forecast	9
1Daily 09/10(4)	04/13/2009	Late replenishment for forecast	9
1Daily 09/10(4)	05/11/2009	Late replenishment for forecast	8
1Daily 09/10(4)	06/15/2009	Late replenishment for forecast	5
1Daily 09/10(4)	07/13/2009	Late replenishment for forecast	11
1Daily 09/10(4)	08/10/2009	Late replenishment for forecast	14

Shipment & Returns - History & Trend Report


This report helps the users evaluate:

1. How did the Plan for key supply chain metrics compare against Actual in past periods?
2. How does it project in the future (History vs. Plan/Forecast)?

This graph plots key service supply chain metrics over time. It indicates how each of the service supply chain metrics have been performing historically and what the plan for them is, looking forward in time. If any of the metrics displays a significant deviation between periods then it is a visual indication of change.



This report can be viewed either as a graph or as a table.

 **Shipments and Returns Trend**

View: Time Trend Table ▼

Plan	Period Start	Shipment History	Planned Shipments	Returns History	Returns Forecast
00spp07 01/06 (0)	12/17/2007				56
00spp06 01/06 (0)	12/17/2007				76
00spp07 01/06 (0)	01/14/2008				56
00spp06 01/06 (0)	01/14/2008				76
00spp07 01/06 (0)	02/11/2008				56
00spp06 01/06 (0)	02/11/2008				76
00spp07 01/06 (0)	03/17/2008				56
00spp06 01/06 (0)	03/17/2008				76

The table provides the following:

- Ability to show or hide the table
- Ability to drill down to the same reports as in the chart
- Up to two decimals displayed

Drill-downs – Shipments to Plan

Demand & Supply Totals by Category

This report is identical to the Demand & Supply totals by Category drill-down from

Demand & Supply Summary report but opens in the context of the filters applied on the parent report.

Demand & Supply Trend

This is similar to the Demand & Supply Trend report in Demand & Supply page but opens in the context of the filters applied on the parent report. While that report permits the user to select multiple measures, when drilling down from here, this report opens to compare Total Demand against Total Usable Supply. This drill-down is available both for the Archived and the Baseline plan. The context of the plan is passed, so that the drill-down report opens for the correct plan.

Top Demands

This is the same as the 'Top Demands' report defined above.

Top Supplies

This is the same as the 'Top Supplies' report defined above.

Exceptions Summary

This report is the same as the 'Exceptions Summary' report defined above.

Drill-downs – Returns to Plan

Top Returns

This is the same as the 'Top Returns' report defined above.

Using the Demand & Supply Page

This page allows the service parts plan analyst to efficiently evaluate how demand & supply in the service supply chain are balanced over time and how they vary from plan to plan. The reports and metrics identified for plan to plan comparison are detailed in the following sections

Page level Filters

The following page level filters are provided:


Baseline Plan	A drop down with a list of plans that is to be used as the baseline. Only one selection is possible.
Comparison Plan:	A drop down with a list of plans from which the comparison plan may be selected. User can select multiple plans from this list.
Category	A drop down with a list of Categories. User can select multiple categories from this list.

Organization	A drop down with a list of Organizations. User can select multiple organizations from this list.
Planner	A drop down with a list of planners. User can select multiple planners from the list.
Period Start	This allows one to select the date from which the report display begins.

Demand & Supply Summary Report

This report helps you see the break up of demand and the usable and defective supplies in each plan, and to determine how demand and supply differ between baseline and comparison plans (for example, to determine what has changed since last month). Both Usable and Defective supplies are shown in report.

The table representing this report and its layout is presented below:

 Demand and Supply Summary		
Planner J. Smith		
	00spp07 01/06 (0)	00spp06 01/06 (0)
Total Demand	6,374	6,769
Sales Orders	582	982
Forecast	1,568	872
Dependent Demand	4,224	4,915
Total Usable Supply	8,049	5,721
Onhand - Usable	1,037	611
In-Transit - Usable	324	255
Purchase order	1,039	1,039
External Repair Order	0	0
Internal Repair Order	0	0
Repair Work Order-External Repair Supplier	0	0
Repair Work Order-Internal Depot Org	0	0
Planned New Buy Order	1,243	1,272
Planned External Repair Order	248	214
Planned Internal Repair Order	248	405
Planned Repair Work Order	3,086	2,249
Planned Transfers - Usable	919	686
Total Defective Supply	3,108	3,754
Onhand - Defective	572	1,442
In-Transit - Defective	630	4,934
Returns Forecast	248	233
Planned Transfers - Defective	2,349	3,247
Total Demand Difference	-75%	-73%
Total Usable Supply Difference	-74%	-81%
Total Defective Supply Difference	-79%	-75%
Projected Fill Rate	150	150
Projected Inventory turns	0	0

The rows 'Total Demand Difference', 'Total Usable Supply Difference' and 'Total Defective Supply Difference' rows are computed as a percentage: (Baseline Plan Value minus Archived Plan Value) / (Archived Plan Value). The table provides the following:

- Ability to drill down to relevant reports (described below) from the Plan Value
- Decimals not shown

Drill-downs

Drill-downs from this report are the same as the drill downs from the Demand & Supply Summary report on the Plan Health Page.

Demand & Supply Trend Across Plans Report

This report allows you to compare a particular demand or supply measure between two

plans. The measures that the planner can compare are: Total Demand, Total Usable Supply, Total Defective Supply, Projected Available Balance (Usable) and Safety Stock Targets. The report can be viewed either as a graph or as a table.

The graph plots the demand and supply measures over time using a line graph. When the lines diverge, it is a visual indication of change in the selected measure between the plans.

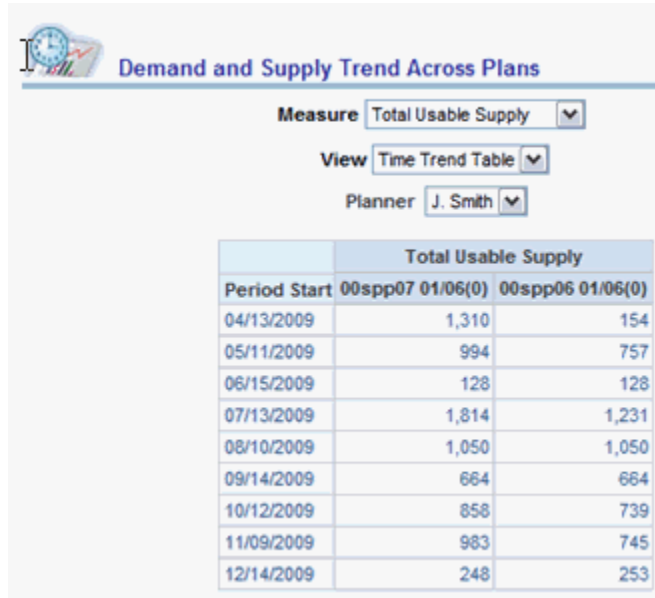
Filter dimensions

The report has a filter by Planner. If no planner is selected, the report renders for all planners. In addition, the user is able to filter the table across the following dimensions:

Measure Type: Ability to select the type of measure to be displayed on the graph. The supported measures are: Total Demand, Total Usable Supply, Total Defective Supply, Safety Stock, and Projected Available Balance (Usable). Users will have ability to select only one measure



A table of values that corresponds to this chart is presented below the chart. The layout would be as follows:



The screenshot shows a web interface titled "Demand and Supply Trend Across Plans". It includes three dropdown menus: "Measure" set to "Total Usable Supply", "View" set to "Time Trend Table", and "Planner" set to "J. Smith". Below these is a table with two columns of data for different time periods.

	Total Usable Supply	
Period Start	00spp07 01/06(0)	00spp06 01/06(0)
04/13/2009	1,310	154
05/11/2009	994	757
06/15/2009	128	128
07/13/2009	1,814	1,231
08/10/2009	1,050	1,050
09/14/2009	664	664
10/12/2009	858	739
11/09/2009	983	745
12/14/2009	248	253

Drill-downs

Demand & Supply Totals by Category

This report is defined under the Demand & Supply totals by Category, page 8-3 drill-down from Demand & Supply Summary report. It is possible to drill down from both the archived plan and the baseline plan. Demand & Supply Totals by Organization
This report is defined under the Demand & Supply Totals by Organization drill-down from Demand & Supply Summary report.

Top Demands

This is the same as the 'Top Demands, page 8-5' report in the Demand & Supply Page. It is viewable by Category, Organization, Zone and Supersession. This drill-down report shows the top demands in the period from which the planner drills down.

Top Supplies

This is the same as the 'Top Supplies, page 8-5' report in the Demand & Supply Page. It is viewable by Category, Organization and Supersession. This drill-down report shows the top demands in the period from which the planner drills down.

Top Returns

This is the same as the 'Top Returns, page 8-5' report in the Demand & Supply Page. It is viewable by Category, Organization, Zone and Supersession. This drill-down report shows the top demands in the period from which the planner drills down.

Top Repairs

This is the same as the 'Top Repairs' report in the Demand & Supply Page. It is viewable by Category, Organization and Supersession. This drill-down report shows the top demands in the period from which the planner drills down.

Replenishment by Type

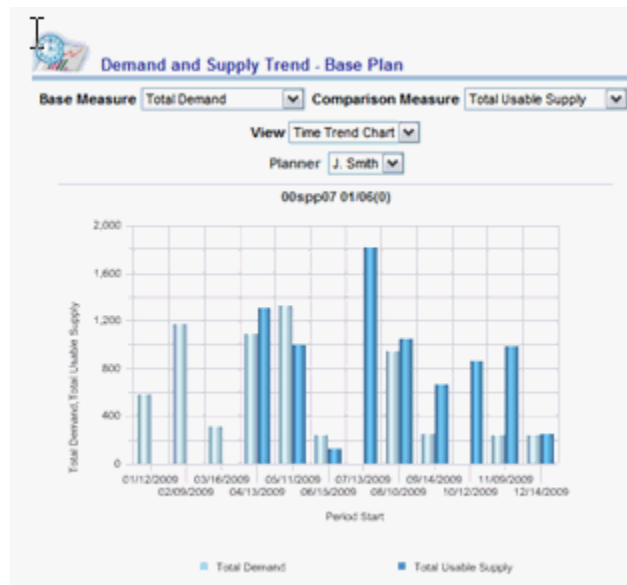
This is the same as the 'Replenishment by Type, page 8-7' report in the Plan Health page. When a planner clicks on the Total Supplies in a particular period and drills down to this report, the Replenishments in that period, by type, are displayed.

Exceptions Summary

This report is the same as the 'Exceptions Summary, page 8-29' report in the Exceptions page. When a planner selects this drill-down, the Exceptions Summary report shows exceptions only in the selected period.

Demand & Supply Trend within Base Plan Report

This report provides the ability to compare measures within a given plan. This can be useful in a number of ways, for example, to compare how demand compares with supply in each period



The planner has the option to view the data as a table. The table provides the ability to drill down to the same report as the chart. The format of the table is as follows:



Drill-downs

Demand & Supply Totals by Category

This report is defined under the Demand & Supply totals by Category, page 8-3 drill-down from Demand & Supply Summary report. The period information (from which we drill down) is passed in, so that the drill-down report is opened only for that period. Page level filters are also respected in the drill-down report.

Demand & Supply Totals by Organization

This report is defined under the Demand & Supply Totals by Organization, page 8-4 drill-down from Demand & Supply Summary report. The period information (from which we drill down) is passed in, so that the drill-down report is opened only for that period. Page level filters are also respected in the drill-down report.

Top Demands

This is the same as the 'Top Demands, page 8-5' report in the Demand & Supply Page. This is viewable by Category, Organization, Zone and Supersession. This drill-down report shows the top demands in the period from which the planner drills down.

Top Supplies

This is the same as the 'Top Supplies, page 8-5' report in the Demand & Supply Page. This is viewable by Category, Organization and Supersession. This drill-down report shows the top supplies in the period from which the planner drills down.

Top Returns

This is the same as the 'Top Returns, page 8-5' report in the Demand & Supply Page. This is viewable by Category, Organization, Zone and Supersession. This drill-down report shows the top supplies in the period from which the planner drills down.

Top Repairs

This is the same as the 'Top Repairs' report in the Demand & Supply Page. This is viewable by Category, Organization and Supersession. This drill-down report show the top repairs in the period from which the planner drills down.

Replenishment by Type

This report is the same as the 'Replenishment by Type, page 8-7' report in the Plan Health page. When a planner clicks on the Total Supplies in a particular period and drills down to this report, the Replenishments in that period, by type, are be displayed.

Exceptions Summary

This report is the same as the 'Exceptions Summary, page 8-29' report in the Exceptions page. When a planner selects this drill-down, the Exceptions Summary report shows exceptions only in the selected period.

Top Demands Report, Top Supplies Report, Top Returns Report, Top Repairs Report

These reports show the top categories/zones/organizations/supersession with the highest demand, the categories / organizations with the highest supplies, the categories/zones/organizations with the highest returns, and the categories / organizations / supersessions with highest repairs.

These show which categories/zones/organizations contribute the bulk of his business so that he can focus on them, especially in case of issues.



It is also possible to view these reports as tables.

Top Demands - Base Plan 00spp07 01/06(0)			Top Supplies - Base Plan 00spp07 01/06(0)		
Top Demands by <input type="text" value="Category"/>			Top Supplies by <input type="text" value="Category"/>		
View <input type="text" value="Table"/>			View <input type="text" value="Table"/>		
Plan	Category	Total Demand	Plan	Category	Total Usable Supply
00spp07 01/06(0)	AIRCRAFT_COMPONENT	5,519	00spp07 01/06(0)	NEW_MISC	10,424
00spp07 01/06(0)	AIRCRAFT_AIRCRAFT	3,853	00spp07 01/06(0)	AUTOMOTIVE_TIRE	7,191
00spp07 01/06(0)	AIRCRAFT_ENGINE	3,719	00spp07 01/06(0)	AIRCRAFT_AIRCRAFT	6,229
00spp07 01/06(0)	NEW_MISC	2,900	00spp07 01/06(0)	AIRCRAFT_ENGINE	5,243
00spp07 01/06(0)	AUTOMOTIVE_BODY	2,665	00spp07 01/06(0)	AIRCRAFT_COMPONENT	677
00spp07 01/06(0)	AUTOMOTIVE_BRAKES	2,374	00spp07 01/06(0)	CIRCUIT_MISC	482
00spp07 01/06(0)	AUTOMOTIVE_TIRE	2,056	00spp07 01/06(0)	AUTOMOTIVE_BRAKES	376
00spp07 01/06(0)	CIRCUIT_MISC	1,944			

Top Returns - Base Plan 00spp07 01/06(0)			Top Repairs - Base Plan 00spp07 01/06(0)		
Top Returns by <input type="text" value="Category"/>			Top Repairs by: <input type="text" value="Organization"/>		
View <input type="text" value="Table"/>			View <input type="text" value="Table"/>		
Plan	Category	Total Returns	Plan	Organization	Total Repairs
00spp07 01/06(0)	NEW_MISC	2,167	00spp07 01/06(0)	MA2_PM	2,726
00spp07 01/06(0)	AIRCRAFT_COMPONENT	2,154	00spp07 01/06(0)	MA2_D2	1,416
00spp07 01/06(0)	AUTOMOTIVE_TIRE	1,297	00spp07 01/06(0)	MA2_DFW	1,201
00spp07 01/06(0)	AIRCRAFT_ENGINE	786	00spp07 01/06(0)	MA2_M3	1,000
			00spp07 01/06(0)	MA2_SFM	952
			00spp07 01/06(0)	MA2_M1	250
			00spp07 01/06(0)	MA2_M2	248
			00spp07 01/06(0)	MAA_V1	248

Drill-downs from Top Demands

Demand & Supply Totals by Category

This report is defined under the Demand & Supply totals by Category, page 8-3 drill-down from Demand & Supply Summary report. The page level filters are respected in the drill-down report.

Demand & Supply Totals by Organization

This report is defined under the Demand & Supply Totals by Organization, page 8-4 drill-down from Demand & Supply Summary report. The page level filters are respected in the drill-down report.

Demand & Supply Totals by Supersession Chain

Demand and Supply Totals by Supersession Chain														
Latest Revision	Sales Orders	Sales Forecast	Dependent Demand	Total Demand	Onhand - Usable	Transfers - Usable	Internal Repairs	External Repairs	New Buy	Total Usable Supply	Onhand - Defective	Transfers - Defective	Total Defective Returns	Link To SPP
SI-FILTER03	MA2.D2		0	502.00	562		0	251	251	0			0	Go
RI-VIEW-ALL	MA2.D2	100	0	300.00	400		0	100	100	0			0	Go
HMR 12 B	MA2.D2		0	0.00			0	0	0				0	Go

Plan is equal to SI-SHOP07 01/06(0) and Category (Inv Items) is equal to NEW.MISC

Demand & Supply Trend

This is the same as the Demand & Supply Trend- Base Plan, page 8-5 report in Demand & Supply page. While that report permits the user to select multiple measures, when drilling down from here, the report opens to show Total Demand against Total supply,

with the context of the cell / bar that the report id drilled down to.

Exceptions Summary

This report is the same as the 'Exceptions Summary, page 8-29' report in the Exceptions page. When selecting this drill-down, the Exceptions Summary report shows exceptions only in the context of the parameters passed (for example category).

Drill-downs from Top Supplies

Demand & Supply Totals by Category

This report is the same as defined under the Demand & Supply totals by Category, page 8-3 drill-down from Demand & Supply Summary report. The page level filters are respected in the drill-down report.

Demand & Supply Totals by Organization

This report is defined under the Demand & Supply Totals by Organization, page 8-4 drill-down from Demand & Supply Summary report. The page level filters are respected in the drill-down report.

Demand & Supply Totals by Supersession Chain

This report is defined under the Demand & Supply Totals by Supersession, page 8-22 drill-down from the Top Demands report. The page level filters are respected in the drill-down report.

Demand & Supply Trend

This is the same as the Demand & Supply Trend- Base Plan, page 8-5 report in Demand & Supply page. While that report permits the user to select multiple measures, when drilling down from here, the report opens to show Total Demand against Total supply, with the context of the cell / bar that the report id drilled down to.

Replenishment by Type

This report is the same as the 'Replenishment by Type, page 8-7' report in the Plan Health page. When a planner clicks on the Total Supplies, the Replenishments by type is displayed in the context of the parameters passed.

Exceptions Summary

This report is the same as the 'Exceptions Summary, page 8-29' report in the Exceptions page. When a planner selects this drill-down, the Exceptions Summary report shows exceptions only in the context of the parameters passed (for example category).

Drill-downs from Top Returns

Demand & Supply Totals by Category

This report is defined under the Demand & Supply Totals by Category, page 8-3 drill-down from Demand & Supply Summary report. The page level filters are respected in the drill-down report.

Demand & Supply Totals by Organization

This report is defined under the Demand & Supply Totals by Organization, page 8-4 drill-down from Demand & Supply Summary report. The page level filters are respected in the drill-down report.

Demand & Supply Totals by Supersession Chain

This report is defined under the Demand & Supply Totals by Supersession , page 8-22 drill-down from the Top Demands report. The page level filters are respected in the drill-down report.

Demand & Supply Trend

This is the same as the Demand & Supply Trend- Base Plan, page 8-5 report in Demand & Supply page. While that report permits the user to select multiple measures, when drilling down from here, the report opens to show Total Demand against Total supply, with the context of the cell / bar that the report id drilled down to.

Exceptions Summary

This report is the same as the 'Exceptions Summary, page 8-29' report in the Exceptions page. When a planner selects this drill-down, the Exceptions Summary report shows exceptions only in the context of the parameters passed (for example category).

Drill-downs from Top Repairs

Demand & Supply Totals by Category

This report is defined under the Demand & Supply Totals by Category, page 8-3 drill-down from Demand & Supply Summary report. The page level filters are respected in the drill-down report.

Demand & Supply Totals by Organization

This report is as defined under the Demand & Supply Totals by Organization, page 8-4 drill-down from Demand & Supply Summary report. The page level filters are respected in the drill-down report.

Demand & Supply Totals by Supersession Chain

This report is defined under the Demand & Supply Totals by Supersession, page 8-22 drill-down from the Top Demands report. The page level filters are respected in the drill-down report.

Demand & Supply Trend

This is the same as the Demand & Supply Trend- Base Plan, page 8-5 report in Demand & Supply page. While that report permits the user to select multiple measures, when drilling down from here, the report opens to show Total Demand against Total supply, with the context of the cell / bar that the report id drilled down to.

Replenishment by Type

This report is the same as the Replenishment by Type, page 8-7 report in the Plan Health page. When a planner clicks on the Total Supplies, the Replenishments by type is displayed in the context of the parameters passed.

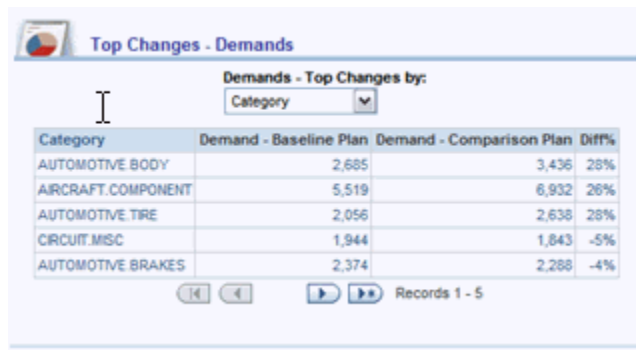
Exceptions Summary

This report is the same as the 'Exceptions Summary, page 8-29 report in the Exceptions page. When a planner selects this drill-down, the Exceptions Summary report shows exceptions only in the context of the parameters passed (for example category).

Running Top Change Reports

These reports compare Demands, Supplies, Returns and Repairs between two plans to see which are the Categories / Zones / Organizations which have the maximum changes between these plans. These are useful in case of issues, and to investigate which of the changes caused the exceptions.

Top Changes - Demands report



Category	Demand - Baseline Plan	Demand - Comparison Plan	Diff%
AUTOMOTIVE BODY	2,685	3,436	28%
AIRCRAFT COMPONENT	5,519	6,932	26%
AUTOMOTIVE TIRE	2,056	2,636	28%
CIRCUIT MISC	1,944	1,843	-5%
AUTOMOTIVE BRAKES	2,374	2,288	-4%

Drill-downs

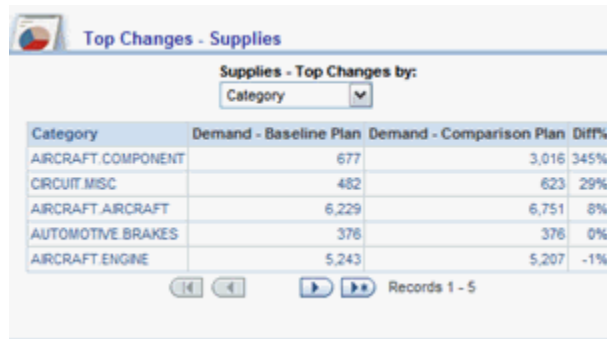
Demand & Supply Trend Report

This report is defined in the 'Demand & Supply Trend within Base Plans' report on the Demand & Supply Page. It opens to the plan from which the planner drills down.

Top Demands Report

This report is defined in the 'Top Demands' report on the Demand & Supply Page. It opens to the plan from which the planner drills down.

Top Changes - Supplies report



Category	Demand - Baseline Plan	Demand - Comparison Plan	Diff%
AIRCRAFT COMPONENT	677	3,016	345%
CIRCUIT MISC	482	623	29%
AIRCRAFT AIRCRAFT	6,229	6,751	8%
AUTOMOTIVE BRAKES	376	376	0%
AIRCRAFT ENGINE	5,243	5,207	-1%

Drill-downs

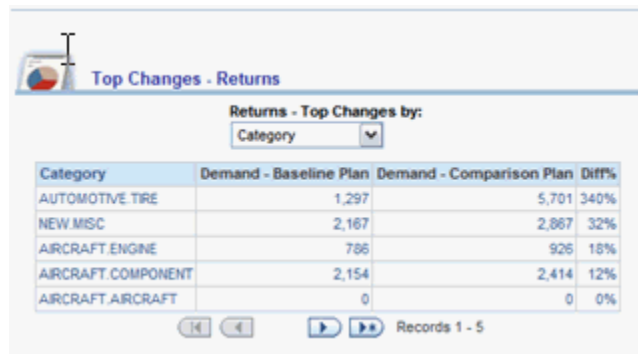
Demand & Supply Trend Report

This report is defined in the 'Demand & Supply Trend within Base Plans' report on the Demand & Supply Page. It opens to the plan from which the planner drills down.

Top Supplier Report

This report is defined in the 'Top Supplies' report on the Demand & Supply Page. It opens to the plan from which the planner drills down.

Top Changes - Returns report



Category	Demand - Baseline Plan	Demand - Comparison Plan	Diff%
AUTOMOTIVE TIRE	1,297	5,701	340%
NEW MISC	2,167	2,867	32%
AIRCRAFT ENGINE	786	926	18%
AIRCRAFT COMPONENT	2,154	2,414	12%
AIRCRAFT AIRCRAFT	0	0	0%

Drill-downs

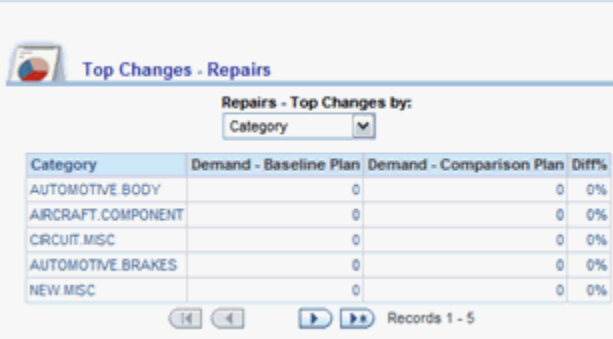
Demand & Supply Trend Report

This report is defined in the 'Demand & Supply Trend within Base Plans' report on the Demand & Supply Page. It opens to the plan from which the planner drills down.

Top Returns Report

This report is defined in the 'Top Returns' report on the Demand & Supply Page. It opens to the plan from which the planner drills down.

Top Changes - Repairs report



Category	Demand - Baseline Plan	Demand - Comparison Plan	Diff%
AUTOMOTIVE BODY	0	0	0%
AIRCRAFT COMPONENT	0	0	0%
CIRCUIT MISC	0	0	0%
AUTOMOTIVE BRAKES	0	0	0%
NEW MISC	0	0	0%

Drill-downs

Demand & Supply Trend Report

This report is defined in the 'Demand & Supply Trend within Base Plans' report on the Demand & Supply Page. It opens to the plan from which the planner drills down.

Top Repairs Report

This report is defined in the 'Top Repairs' report on the Demand & Supply Page. It opens to the plan from which the planner drills down.

Using the Exceptions Page

This page contains reports that allow users to analyze exceptions in the current plan and help compare against an alternate plan.

Page level Filters

The following page level filters are provided:

Baseline Plan	A drop down with a list of plans that is to be used as the baseline. Only one selection is possible.
Comparison Plan	A drop down with a list of plans from which the comparison plan may be selected. The user can select multiple plans from this list.
Category	A drop down with a list of Categories. The user can select multiple categories from this list.

Planner	A drop down with a list of planners. User can select one planner to see exceptions on the items he plans
Organization	A drop down with a list of Organizations. The user can select multiple organizations from this list.
Time	Ability to select the time unit against which the reports should be displayed. The supported Time measures include: Week, Month, and Quarter
Planner	A drop down with a list of planners. The user can select multiple planners from the list.
Period Start	This allows one to select the date from which the report display begins

Exceptions Report

The first thing a planner usually does while reviewing a plan is to look at the exceptions in the plan. Hence the Exceptions in the plan are included in the Plan Health form. This report would help the planner analyze exceptions in the Baseline plan and compare them with the Archived plans.

The format of the report is shown below:

Organization Code	00spp07 01/06(0)	00spp06 01/06(0)
MAA:V1	7	2
MA2:D2	2	4
MA2:DFW	4	2

The 'Exception' drop down contains all exceptions in an SPP plan and the planner can select one from the list to compare the two plans against.

In case there are multiple measures for an exception – for example, Safety stock exceptions can be measured in quantity or days – the Measure drop down has a list of values that the planner can select from.

The planner has the ability to view the exceptions in the plan along different dimensions – Supersession chain, Category and Organization.

Drill-downs

Drill-downs from this report are the same as the drill downs from the 'Exceptions' report on the Plan Health page.

Exceptions Summary Report

This report helps users analyze exceptions in the Baseline Plan and compare exceptions between the Baseline and Comparison Plans. The comparison plan may be a prior plan (what has changed since last month?) or an alternate plan. (Can we do better than the current plan?)

The table representing this report and its layout is presented below:

Demand Exceptions Summary							
Exception Type	Plan	Exception - Count	Count Diff%	Exception - Days	Days Diff%	Exception - Value (USD)	Value Diff%
Late replenishment for forecast	00app07 01/06(0)	2	0	1	0		
Late replenishment for sales order	00app07 01/06(0)	1	0	7	0		
Late replenishment for sales order	00app06 01/06(0)	8	700	8	14		

Supply Exceptions Summary				Inventory Exceptions Summary			
Exception Type	Plan	Exception - Count	Count Diff%	Exception Type	Plan	Exception - Count	Count Diff%
Late supply pegged to forecast	00app07 01/06(0)	7	0	Items below safety stock	00app07 01/06(0)	2	0
Late supply pegged to forecast	00app06 01/06(0)	1	-86	Items below safety stock	00app06 01/06(0)	17	750
Late supply pegged to sales order	00app07 01/06(0)	2	0	Items with a shortage	00app07 01/06(0)	6	0
Late supply pegged to sales order	00app06 01/06(0)	1	-50	Items with a shortage	00app06 01/06(0)	8	33

Alternate Exceptions Summary				Reschedule Exceptions Summary			
Exception Type	Plan	Exception - Count	Count Diff%	Exception Type	Plan	Exception - Count	Count Diff%
Demand satisfied using Supersession items	00app07 01/06(0)	1	0	Orders to be rescheduled out	00app07 01/06(0)	8	0
Demand satisfied using Supersession items	00app06 01/06(0)	4	300	Orders to be rescheduled out	00app06 01/06(0)	14	75
Order sourced from alternate supplier	00app07 01/06(0)	1	0				
Order sourced from alternate supplier	00app06 01/06(0)	1	0				

The table provides the following:

- Ability to drill down to relevant reports (described below) from the Plan Value
- Note that this report is a mixed report in that some of the exceptions are in Dollars (\$), some in Quantity, Some as Ratio and others as Count or Days.
- In case of Exception Type as Value – reporting currency will be used.

Drill-downs

Exceptions by Category

This report is defined in the 'Exceptions by Category, page 8-10' drill-down from the Exceptions report on the Plan Health page. This report would open for the exception from which the planner drills down. .

Exceptions by Organization

This report is defined in the 'Exceptions by Organization, page 8-10' drill-down from the Exceptions report on the Plan Health page. This report would open for the exception from which the planner drills down.

Exceptions by Supersession

This report is defined in the 'Exceptions by Supersession Chain, page 8-10' drill-down from the Exceptions report on the Plan Health page. This report would open for the exception from which the planner drills down.

Exceptions Trend

This report is defined in the 'Exceptions Trend, page 8-10' drill-down from the Exceptions report on the Plan Health page. This report would open for the exception from which the planner drills down.

Exceptions by Supplier

This report is defined in the 'Exceptions by Supplier' drill-down from the Exceptions report on the Plan Health page. This report would open for the exception from which the planner drills down.

Demand Supply Trend

This report is defined in the 'Demand & Supply Trend, page 8-5' report on the Demand & Supply Page. This report would open with the Measure Total Demand selected

Using the Service Level Agreement Analysis Page

This page allows comparing plans on service levels, costs, inventory and profitability, and is ideally suited to evaluate contracts and service levels. In case of a new service level agreement, it is possible to compare two plans, with and without the agreement, to evaluate the impact of taking up the contract, on inventory value, profitability, costs etc. Thus, this report can aid the planner in deciding whether or not to take up a new contract or SLA.

Note: The reports in this section are based on Inventory Optimization plans.

Page Layout

This page includes the following reports:

- SLA Summary
- SLA Comparison Across Plans
- Service Level Analysis – Most & Least Compliant

- Profitability Analysis
- Safety Stock across Plans

Page level Filters

The following page level filters are provided to the user:

Baseline Plan	A drop down with a list of baseline plans. Only one selection is possible.
Comparison Plan	A drop down with a list of plans from which the comparison plan may be selected. Users have the ability to select multiple plans from this list. .
Category	A drop down with a list of Categories. User have the ability to select multiple categories from this list.
Organization	A drop down with a list of Organizations. User have the ability to select multiple organizations from this list.
Planner	A drop down with a list of planners. User have the ability to select multiple planners from the list.
Period Start	This allows one to select the date from which the report display begins

Service Level Agreement Summary Report

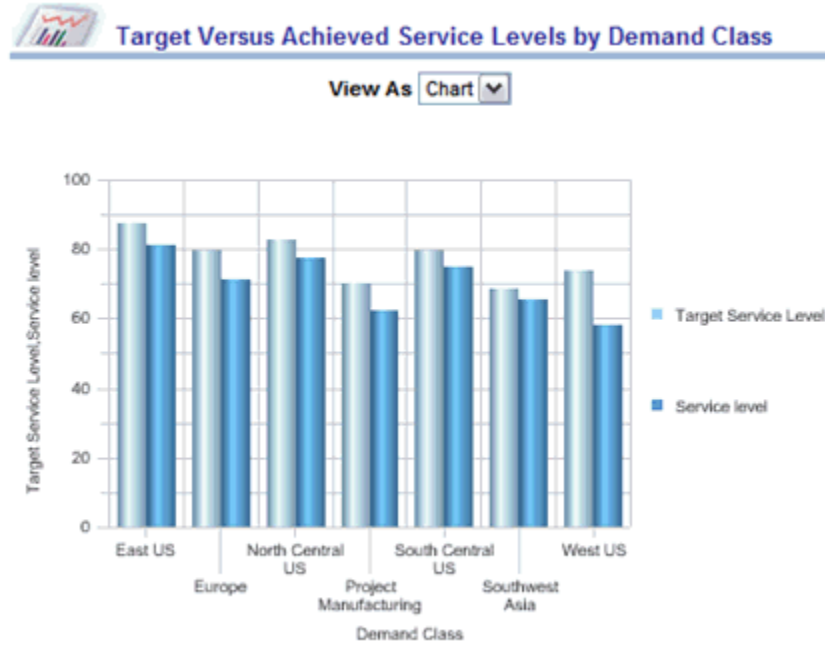
This report enables you to review multiple plans simultaneously along several dimensions, to see if SLAs are being met, and the profitability of the individual plans. A service organization may have service level agreements with several customers, in which case, this report helps look at the Target vs. Planned service levels in the two plans. It is also possible to compare inventory values, different costs (like Purchase Cost, Repair costs, carrying costs, transportation cost) revenue, profit, and so on, between the selected plans.

The format of the report is shown below:

SLA Summary										
Plan	Target Service Level	Achieved Service Level	Inventory Value	Carrying Cost	Transportation cost	Purchasing Cost	Total Cost	Total Revenue	Profit	Profit Percent
00101 01/06 (0)	79	72	2,979	284	448	900	1,632	1,740	1,061	61
00102 01/06 (0)	77	70	2,979	144	396	1,170	1,710	2,046	336	16

Drill-downs

Target vs Achieved Service Levels by Demand Class

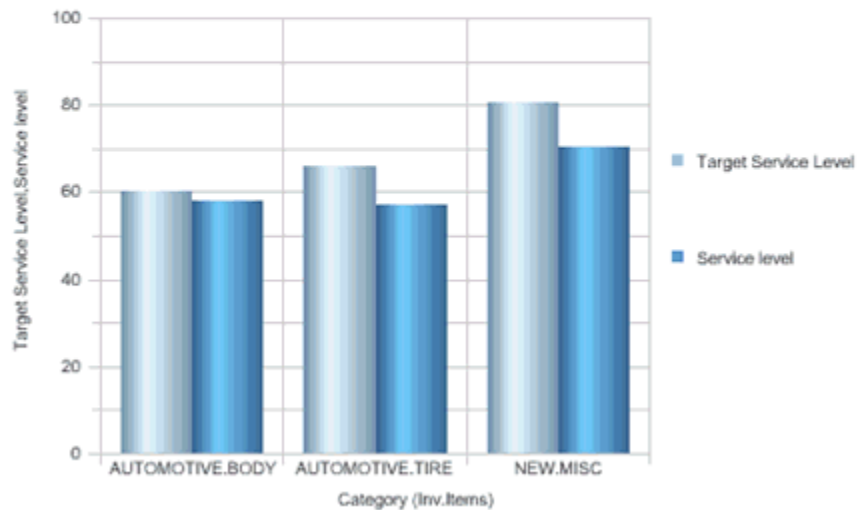


Target vs Achieved Service Levels by Category



Target Versus Achieved Service Levels by Category

View As

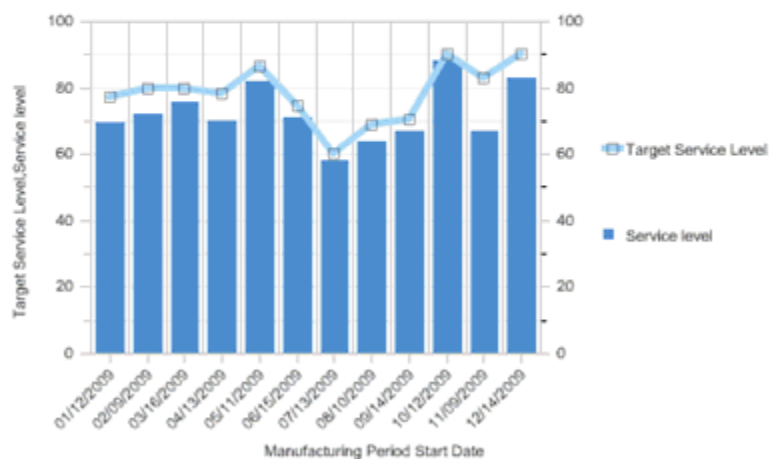


Target vs Achieved Service Levels Trend



Target Versus Achieved Service Levels Trend

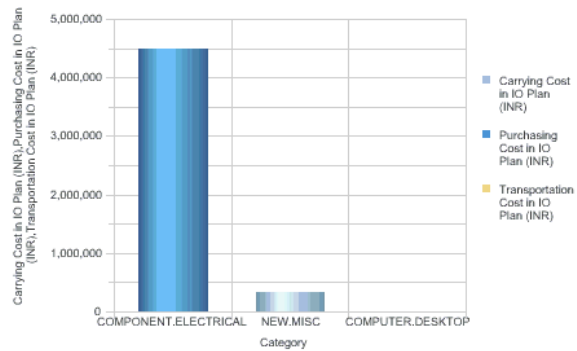
View As



Top Contribution to Costs

Top Contribution to Costs

View by Category



Plan	Category	Carrying Cost in IO Plan (INR)	Purchasing Cost in IO Plan (INR)	Transportation Cost in IO Plan (INR)
CS-IO-SPP6 02/11(0)	COMPONENT.ELECTRICAL	0	4,500,225	0
CS-IO-SPP6 02/11(0)	NEW.MISC	325,443	0	0
CS-IO-SPP6 02/11(0)	COMPUTER.DESKTOP	0	0	0

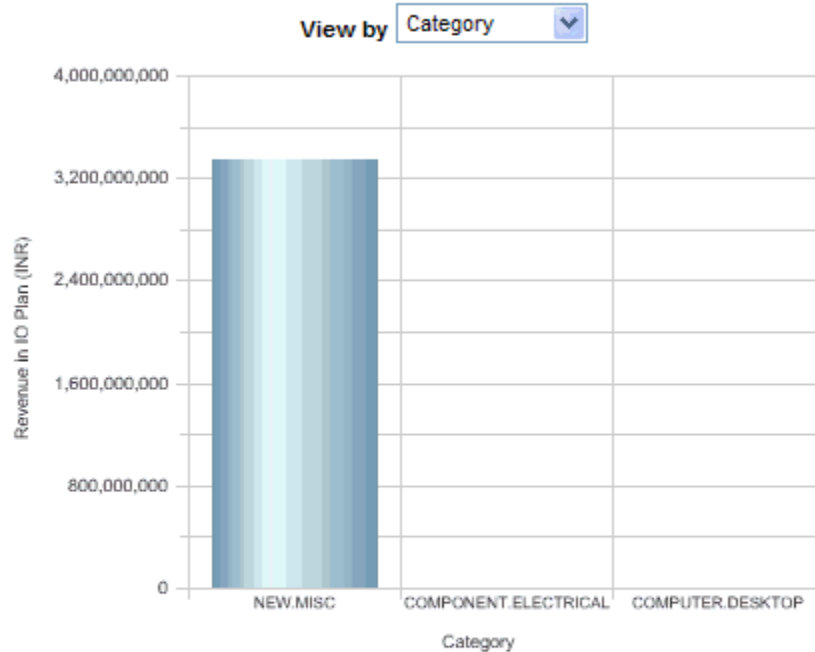
[Return](#) - [Create Bookmark Link](#)

Note: The View By can be by Category, Organization

Top Contribution to Revenue



Top Contribution to Revenue



Plan	Category	Revenue in IO Plan (INR)
CS-IO-SPP6 02/11(0)	NEW.MISC	3,337,861,749
CS-IO-SPP6 02/11(0)	COMPONENT.ELECTRICAL	0
	COMPUTER.DESKTOP	0

[Return](#) - [Create Bookmark Link](#)

Note: The View By can be by Demand Class, Category, Organization

Top Contribution to Profit

Note: The View By can be by Category, Organization

SLA Comparison Across Plans Report

This report enables a planner to compare Service Levels Agreements / Contracts, across plans.

Filter dimensions

The planner specifies the following at the report level:

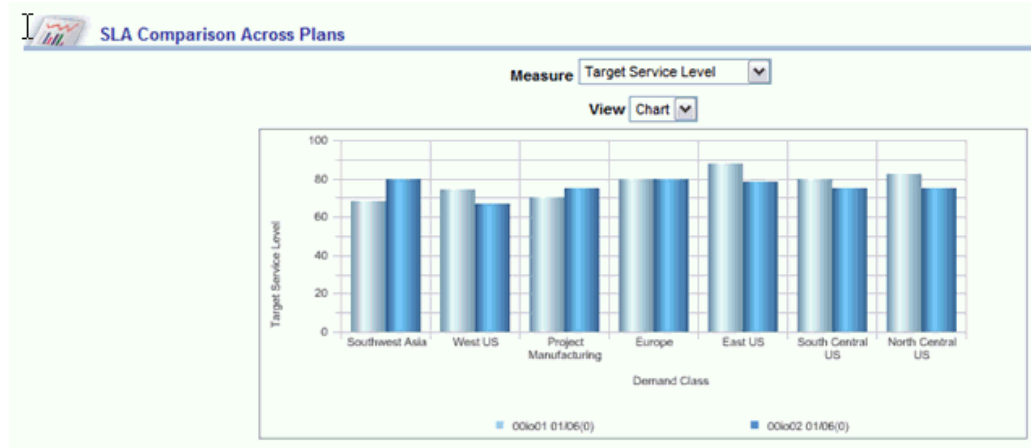
- **Measure:** The measure on which the planner wants to compare the two plans.
Allowed measures are: Target Service Level, Achieved Service Level, Total Revenue

- **View As:** to specify whether the report should be displayed as a Chart or Table.

Report Description

This report allows the planner to compare service level agreements in two plans along different measures. The plans to be compared are specified as page level filters. The report compares the SLAs planned for in the two plans, based on the measure selected, and the report is displayed either as a Graph or as a Table, depending on the User's report level selection.

The layout of this report is shown below:



It can also be viewed as a table, as follows:

The table displays the Target Service Level for various Demand Classes across two plans: 00io01 01/06(0) and 00io02 01/06(0). The Y-axis represents the Target Service Level from 0 to 100. The X-axis lists the Demand Classes: Southwest Asia, West US, Project Manufacturing, Europe, East US, South Central US, and North Central US. The table shows that for most Demand Classes, the Target Service Level is higher in plan 00io02 01/06(0) than in plan 00io01 01/06(0).

Demand Class	Target Service Level	
	00io01 01/06(0)	00io02 01/06(0)
Southwest Asia	68.33	79.67
West US	74.00	66.67
Project Manufacturing	70.25	75.00
Europe	79.55	79.91
East US	87.67	78.33
South Central US	79.75	74.88
North Central US	82.55	75.09

Drill-downs

Target vs. Achieved Service Level – by Category

This report is similar to the Target vs. Achieved Service Level by Category drill-down from the SLA Summary screen. The report opens in the context of the Demand Class from which the planner drills down to this report.

Target vs. Achieved Service Level Trend

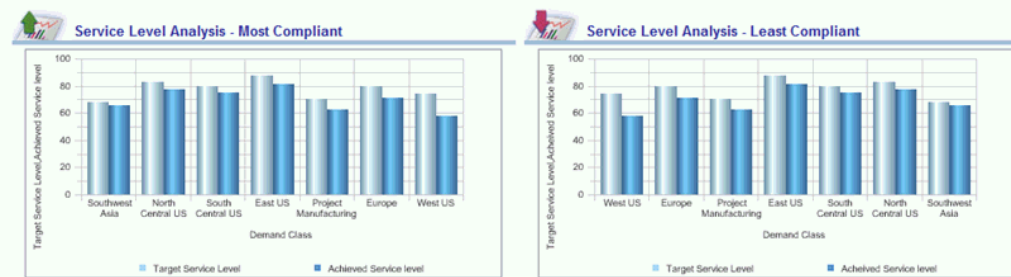
This report is similar to the Target vs. Achieved Service Level Trend drill-down from the SLA Summary screen. The report opens in the context of the Demand Class from which the planner drills down to this report

Top Contribution to Revenue

This report is similar to the Top Contribution to Revenue drill-down from the SLA Summary screen. When the planner selects this drill-down a second level selection determines the dimension on which the planner wants to view the Top Contribution to Revenue (Demand Class, Category) . The report opens in the context of the Demand Class from which the planner drills down to this report.

Service Level Analysis Report

This report has two constituent reports, allowing a planner to analyze a plan and identify service level agreements with the least and most deviation from agreed targets. It allows you to identify service level contracts with the least and greatest deviation from target. The layout of the report is shown below:



Drill-downs

Target vs. Achieved Service Level – by Category

This report is similar to the Target vs. Achieved Service Level by Category, page 8-32 drill-down from the SLA Summary screen. The report opens in the context of the Demand Class from which the planner drills down to this report.

Target vs. Achieved Service Level Trend

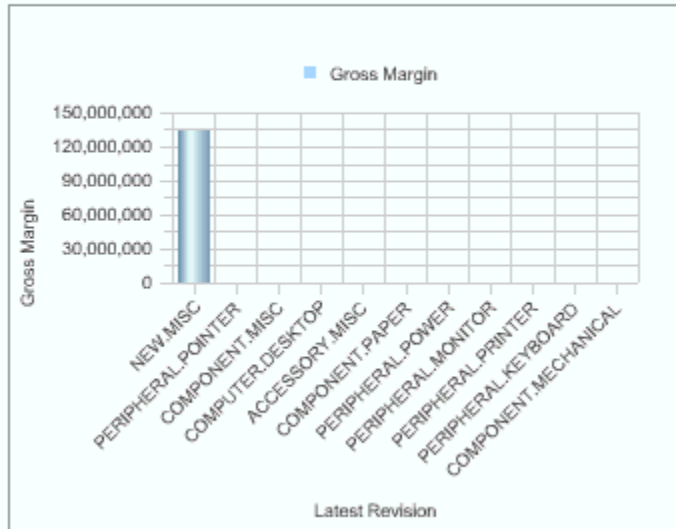
This report is similar to the Target vs. Achieved Service Level Trend, page 8-33 drill-down from the SLA Summary screen. The report opens in the context of the Demand Class from which the planner drills down to this report

Profitability Analysis Report

This report helps identify the most and least profitable items in the service supply chain. The layout of the report is shown below:



Profitability Analysis



Drill-downs

Target vs. Achieved Service Level Trend

This report is similar to the Target vs. Achieved Service Level Trend, page 8-33 drill-down from the SLA Summary screen. The report opens in the context of the item from which the planner drills down to this report

Safety Stock Across Plans Report

This report helps compare safety stock targets between multiple plans. The layout is shown below:



Safety Stock Across Plans

View Time Trend Chart



Drill-downs

Safety Stock by Category

This report shows the safety stock targets by category for the plan that is drilled down from.



Safety Stock by Category

000_sb_io 01/06(1)

Category (Inv.Items)	Safety Stock Value
ASSEMBLY.MISC	
ASSEMBLY.SUBASSY	
COMPONENT.ELECTRICAL	
COMPONENT.MECHANICAL	
COMPUTER.HANDHELD	

Safety Stock by Organization

This report shows the safety stock targets by organization for the plan that is drilled down from.



Safety Stock by Organization

000_sb_io 01/06(1)

Organization	Safety Stock Value
TST:M1	125
TST:W1	252
TST:D2	18
TST:M3	1151
TST:DWH	42

Safety Stock by Supersession Chain

This report shows the safety stock targets by supersession chain for the plan that is drilled down from.



Safety Stock by Supersession

000_sb_io 01/06(1)

Organization	Safety Stock Value
IS30152	125
CM62229	252
AS66111	18
FA19732	1151
GF18192	42

Using the Historical Performance Page

This page has reports that allow users to assess the supply chain performance from period to period. It page contains historical information and provides the ability to compare previously Planned value to Actuals in those past periods

Page level Filters

The following page level filters are provided:

- **Archived Plan:** A drop down with a list of plans to be used as the baseline. Only one selection is possible.
- **Period:** Provides the ability to select the date range over which reports will be displayed

Archived Plans: 00spp07 01/06(0) ▼

Period Start: [] ... Go

Service Supply Chain Performance Report

Filter dimensions

The user is able to filter the table across the following dimensions in addition to the page level filters:

- **Time 1:** A drop down with a list of start dates corresponding to the selected Time Type from which the baseline period is selected. Only one selection is possible.
- **Time 2:** A drop down with a list of start dates corresponding to the selected Time Type from which the comparison period may be selected. Only one selection is possible.

Report Description

This report helps you analyze performance metrics in Period Time 1 and compare supply chain metrics between periods Time 1 and Time 2. The table representing this report and its layout is presented below

Supply Chain Performance Metrics	
Period Start	02/11/2008 ▼
Shipments to Plan (%)	0%
Returns To Plan	156%

Supply Chain Performance Metrics	
Period Start	02/11/2008 ▼
Shipments to Plan (%)	0%
Returns To Plan	156%

The table provides the following:

- Ability to drill down to relevant reports .
- Shipments to Plan is computed as: (Shipments History) / (Consensus Forecast)

- Returns to Plan is computed as (Returns History) / (Consensus Returns Forecast)
- The actuals (Shipments, Returns) required for computing these measures may be obtained from history data.

Drill-downs

Top Demands

This is the same as the 'Top Demand' report in the Demand & Supply Page. This should be viewable by Category, Organization, Zone and Supersession.

Top Returns

This is the same as the 'Top Returns, page 8-5' report in the Demand & Supply Page, and is viewable by Category, Organization, Zone and Supersession.

Shipments to Plan

This report is similar to the 'Shipments to Plan, page 8-11' report detailed below.

Returns to Plan

This report is similar to the 'Returns to Plan, page 8-11' report detailed below.

Exceptions Summary

This report is similar to the 'Exceptions Summary, page 8-29' report under the Exceptions page.

Service Supply Chain Metrics – Trend Report

Report Description

This report helps you evaluate:

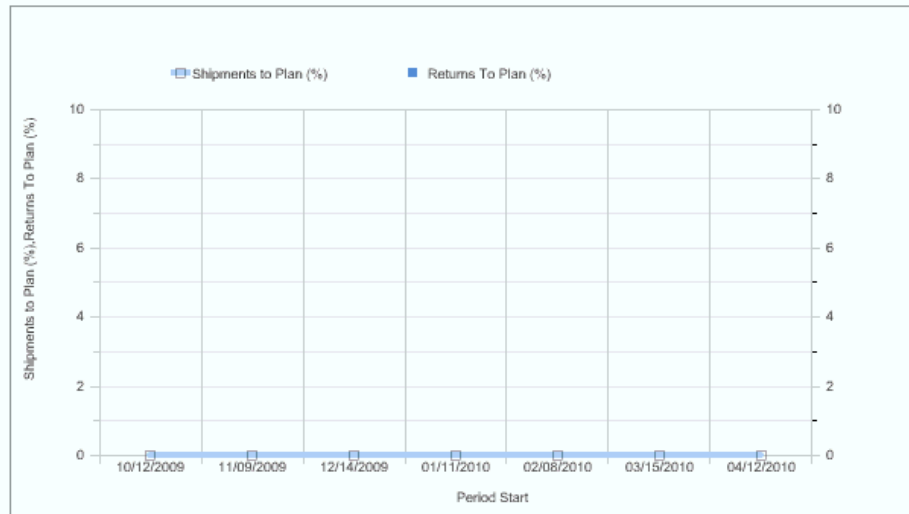
- How have the key supply chain metrics been trending over time
- How do we project them to trend in the future given the plan

The graph plots key supply chain metrics over time. It indicates how each of the supply chain metrics have been performing against the plan value both historically and looking forwards in time. If any of the metrics displays a significant deviation between periods then it is a visual indication of change.



Supply Chain Metrics Trend

View Time Trend Chart ▾



The report provides the:

- Ability to view the data either as a graph or as a table
- Ability to drill down to the detail reports

Drill-downs

Top Demands

This is the same as the 'Top Demand, page 8-5' report in the Demand & Supply Page, and is viewable by Category, Organization, Zone and Supersession. The Top Demands in the period from where the Planner drills down are displayed.

Top Returns

This is the same as the 'Top Returns, page 8-5' report in the Demand & Supply Page, and is viewable by Category, Organization, Zone and Supersession. The Top Returns in the period from which the planner drills down are displayed.

Shipments to Plan

This report is similar to the 'Shipments to Plan, page 8-11' report detailed below. However, the shipments to plan in the period that the planner drills down from are displayed

Returns to Plan

This report is similar to the 'Returns to Plan' report detailed below. The Returns against forecast in the period that the planner drills down from are displayed.

Exceptions Summary

This report is similar to the 'Exceptions Summary, page 8-11' report under the Exceptions page. Only exceptions in the period that the planner drills down from are displayed.

Shipments to Plan Report

Filter dimensions

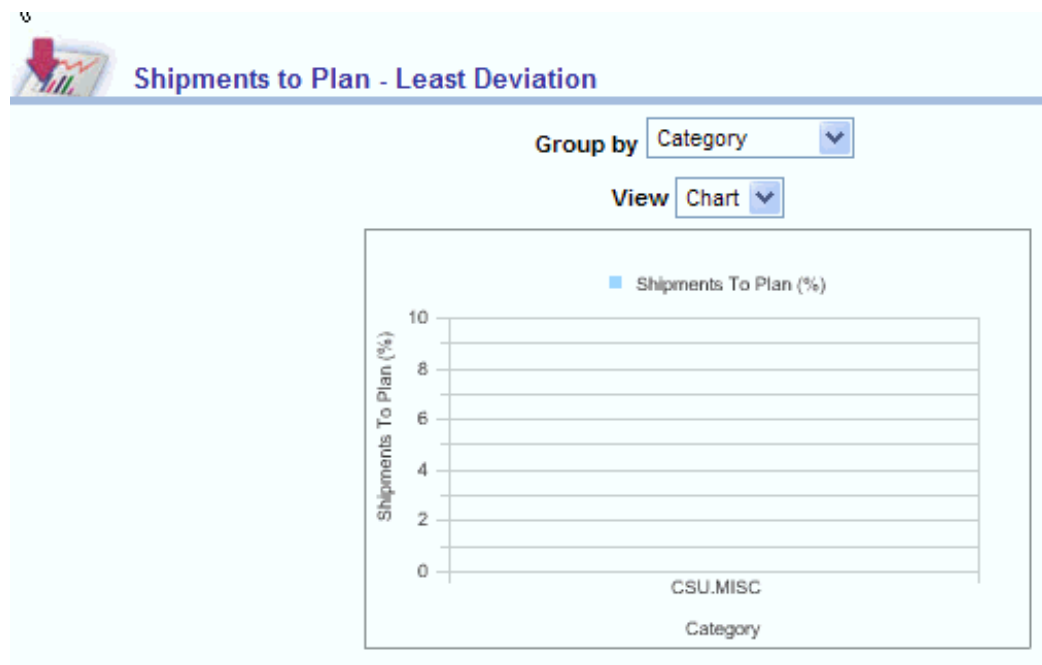
In addition to page level filters, the following filters specified at the report level are respected:

- Group By – The dimension on which the Top / Bottom N are to be displayed. Valid values are Category, Supersession, Zone, Organization.

For example, if the planner selects Group By=Category, the Top and Bottom N categories with Shipment to Plan are shown.

Report Description

This report consists of two graphs and shows the Planner the top and bottom Shipments to Plan, by Category / Zone / Supersession / Org. , Using this report, the planner can see which categories / zones / supersession / organizations are shipping close to planned values and which are deviating most from the plan. The graphs for this report are displayed below:

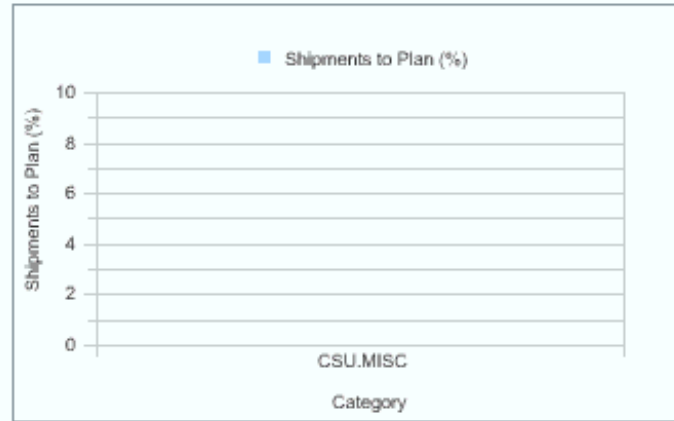




Shipments to Plan - Most Deviation

Group by

View



The report provides the:

- Ability to view the data either as a graph or as a table
- Ability to drill down to the detail reports

Drill-downs

Top Demands

This is the same as the 'Top Demand, page 8-5' report in the Demand & Supply Page. There are four different drill-downs, for Top Demands by Category, Top Demands by Organization, Top Demands by Zone and Top Demands by Supersession

Top Supplies

This is the same as the 'Top Supplies, page 8-5' report in the Demand & Supply Page. There are three different drill-downs, for Top Supplies by Category, Top Supplies by Organization and Top Supplies by Supersession

Demand & Supply Totals by Category

This report is as defined under the Demand & Supply totals by Category , page 8-3 drill-down from Demand & Supply Summary report.

Demand & Supply Totals by Organization

This report is as defined under the Demand & Supply totals by Organization , page 8-4 drill-down from Demand & Supply Summary report.

Demand & Supply Trend

This is the same as the Demand & Supply Trend- Base Plan , page 8-5report in Demand

& Supply page. While that report permits the user to select multiple measures, when drilling down from here, the report opens for Total Demands vs Total Usable Supplies selected.

Exceptions Summary

This report is similar to the Exceptions Summary, page 8-29 report on the Exceptions page.

Returns to Plan Report

Filter dimensions

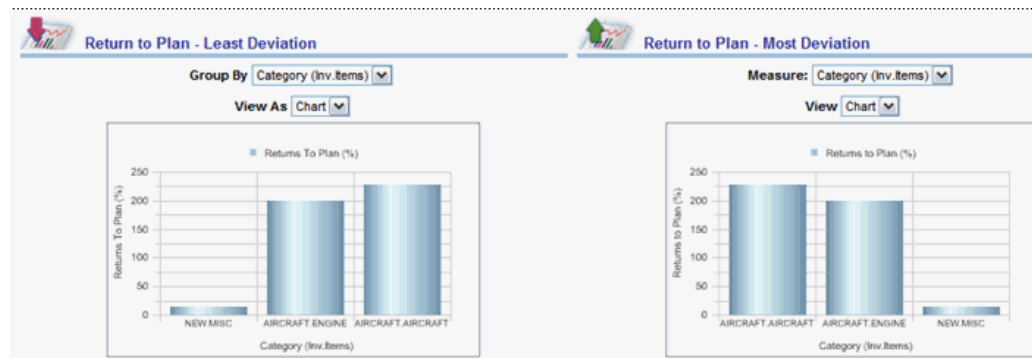
In addition to page level filters, the following filters specified at the report level are respected:

- Group By – The dimension on which the Top / Bottom N are to be displayed. Valid values are Category, Supersession, Zone, Organization.

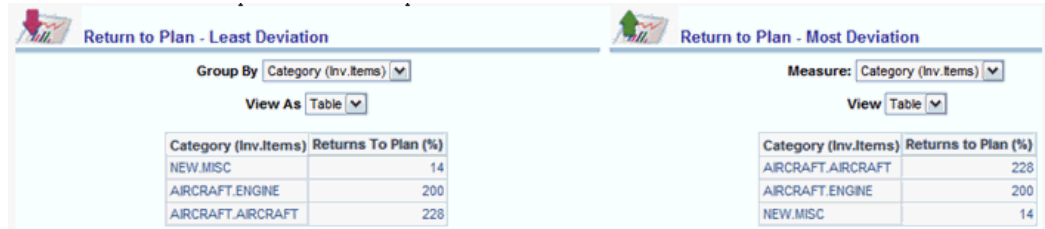
For example, if the planner selects Group By=Category, the Top and Bottom N categories with Returns to Plan are shown.

Report Description

This report shows the Planner the top / bottom Returns to Plan, by Category / Zone / Supersession / Org. It allows the planner to see which categories / zones / supersession / organizations had returns close to forecast values and which are deviating the most from forecast. The graph for this report is displayed below:



A table of values that corresponds to this chart is presented below:



The report provides the:

- Ability to view the data either as a graph or as a table
- Ability to drill down to the detail reports

Drill-downs

Top Returns

This is the same as the 'Top Returns, page 8-5' report in the Demand & Supply Page. When this is selected from the drill down menu, a second level of drill-down opens up, allowing the planner to specify the dimension on which he would like to see the Top Returns– that is, Top Returns by Category, Organization, Zone etc.

Exceptions Summary

This report is similar to the Exceptions Summary, page 8-29 report on the Exceptions page.

Understanding the Trade Analysis Dashboard

Introduction to the Trade Analysis Dashboard

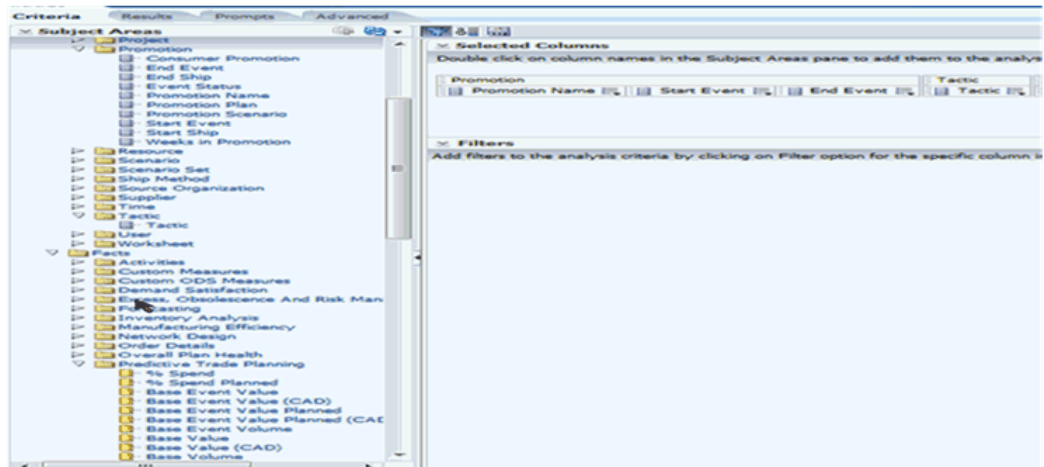
Demantra Predict Trade Planning (PTP) allows users to create and track promotions and provides reporting capabilities. Through the integration of PTP and APCC, you can:

- Publish PTP-APCC Measures Workflows
- Promotion entities available in APCC
- Analyze data in the Trade Analyst Dashboard
- Analyze and report on upcoming promotions as well as view past performance. This includes viewing promotion data by tactic, promotion, retailer or product.

The Publish PTP-APCC measures workflows publish aggregate and detailed measures to APCC including:

- Plan measures at the aggregate level, visible in the RT S&OP dashboard
- Promotion measures at a detailed level, visible in the Trade Analyst dashboard

On the APCC side of the integration from the Sales and Operation Planning dashboard, the S&OP analyst creates custom reports and graphs, based on the promotion measure that are imported from PTP. Use the Analysis menu choice in the Sales and Operations Planning Dashboard to access the promotion dimensions and measures.

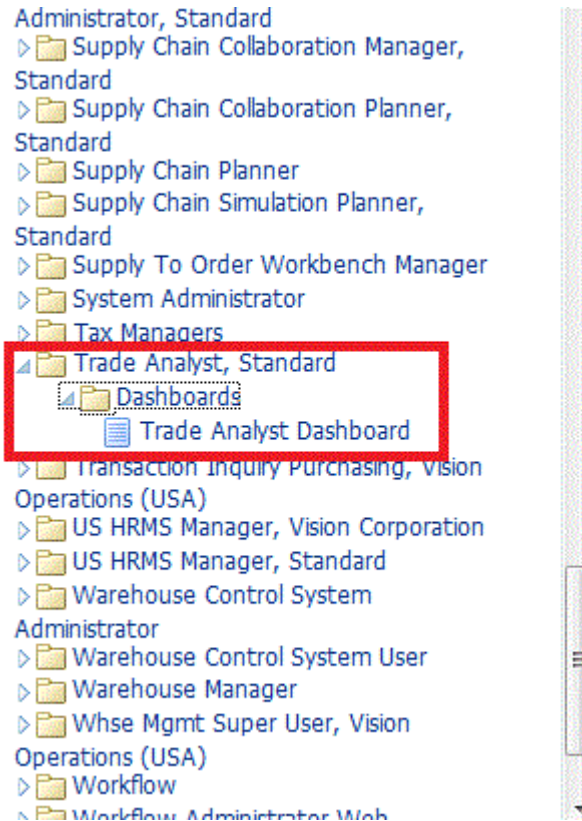


Using the Trade Analyst Dashboard

Detail promotion data measures are available in the Trade Analyst Dashboard, using the Trade Planner responsibility.

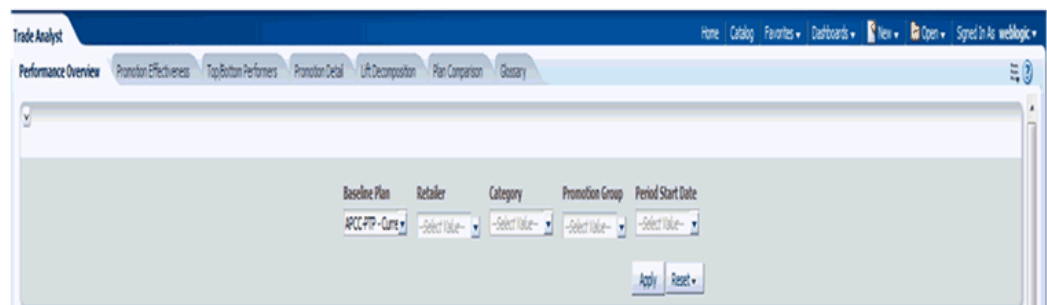
To access the Trade Analyst Dashboard:

1. Click Trade Analyst, Standard. This choice is near the bottom of your choices.



2. Click the Dashboards folder, then click Trade Analyst Dashboard.

The Trade Analyst dashboard opens.



The Trade Analyst Dashboard has six promotion analysis tabs plus a glossary. The tabs are organized to provide a specific type of information. You can select Baseline Plan, Retailer, Category, Promotion Group, and Time Periods. Each tab provides access to two to five reports and/or graphs. The tabs and the reports and graphs you can access from that tab are listed in the table below.

Tab	Available Graphs and Reports
Performance Overview	<ul style="list-style-type: none"> • Incremental Sales by Price Point graph • Incremental Sales by Price Point report
Promotion Effectiveness	<ul style="list-style-type: none"> • Tactic and Price graph • Tactic Effectiveness by Promotion Group report • Tactic Effectiveness by Promotion Group graph
Top/Bottom Performers	<ul style="list-style-type: none"> • Top and Bottom Promotions by Cost Per Incremental Unit (CPIU) graphs • Top and Bottom Promotions by Lift graphs • Top and Bottom Promotions by Net Incremental Profit graphs
Promotion Detail	<ul style="list-style-type: none"> • Promotion by Retailer report • Promotion by Tactic report • Report by Promotion
Lift Decomposition	<ul style="list-style-type: none"> • Lift Decomposition by Promotion graph • Lift Decomposition by Promotion report
Plan Comparison	<ul style="list-style-type: none"> • Compare Plans graph • Compare Plans report

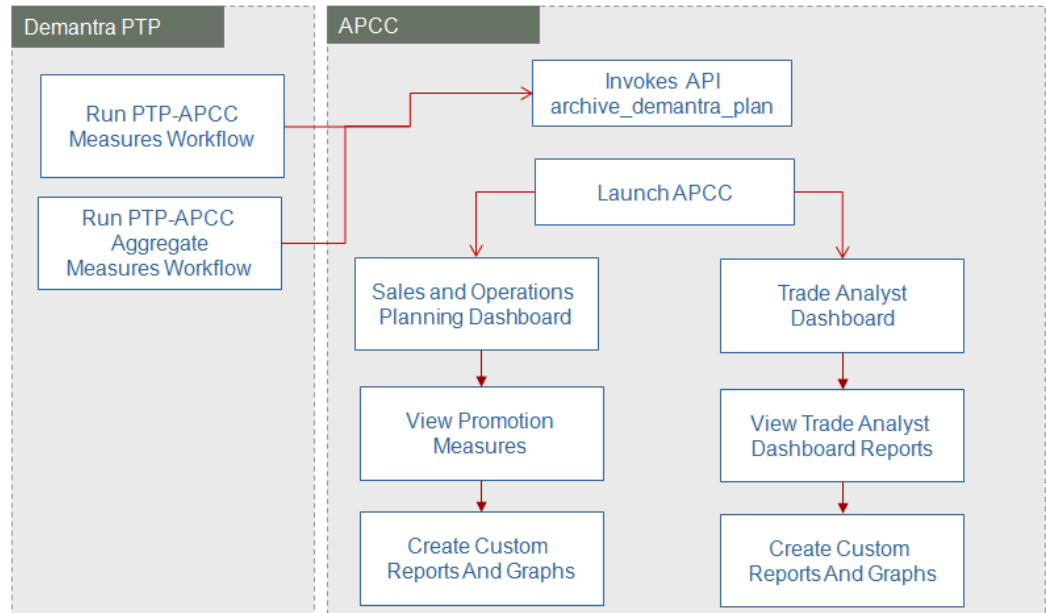
Publishing from PTP to APCC

There are two workflows for publishing the detail and aggregate promotion measures. The process is similar to the Demantra Publish S&OP-APCC Measures. There are two

branches:

- Plan measures at aggregate level - PTP-APCC Aggregate Measures Workflow
- All promotion measures at detail level - PTP-APCC Measures Workflow

The promotion flow is:



The process of publishing starts by running the PTP-APCC Measures Workflow. From there, you go to either the Sales and Operations Planning Dashboard or the Trade Analyst Dashboard. If you are in S&OP, view the Promotion Measures and Dimensions using the Analysis menu choice. If you are in the Trade Analyst dashboard, view the Trade Analyst Dashboard reports. You create custom reports and custom graphs from both dashboards.

The dimensions and hierarchies in APCC are:

- Promotion: Promotion Plan, Promotion
- Promotion: Promotion Scenario Promotion
- Item: Promotion Group, then Item
- Tactic
- Customer: Customer, Retailer

The promotion measures that are visible in the S&OP Analyst dashboard are:

- Base Volume

- Incremental Event Volume
- Total Event Volume
- Base Value
- Incremental Event Value
- Total Event Value
- Manufacturer List Price
- Regular Price
- Promoted Price
- Promotional Cannibalization Volume Forecast
- Promotional Cannibalization Value Forecast
- Promotional Pre-Post Effect Volume Forecast
- Promotional Pre-Post Effect Value Forecast
- Promotional Net Incremental Value Forecast

The detailed promotion measures that are visible in the Trade Analyst dashboard are:

- Promotion
- Tactic
- Item
- Site
- Org (optional)
- Date

Publishing to APCC generates a new APCC archive, which includes the promotion measures. All measures are plan-specific. The default plan names are:

- APCC-PTP (detail measures)
- APCC-PTP-A (aggregate measures)

Understanding Promotional Entities

You create custom reports and graphs based on the promotion measures that are imported from PTP.

Understanding Dimensions, Levels, and Hierarchies

Mandatory Dimensions, Levels, and Hierarchies

The table below lists the dimensions, levels, and hierarchies that are required to create your custom reports and graphs.

Dimension	Hierarchy/Level	Comments
Promotion	Promotion Plan	2 level hierarchy
	Promotion	
Promotion	Promotion Scenario	2 level hierarchy
	Promotion	
Tactic	Promotion Tactic	Tactic level values are:
		• Feature Only
		• Display Only
		• Feature and Display
		• Temporary Price Reduction (TPR)
		• User provided additional tactics
Customer	Customer	Customer, Retailer is another hierarchy of the Account/Customer dimension
	Retailer	

Additional Dimensions, Levels, and Hierarchies

In addition to the required dimensions, level, and hierarchies, there are additional parameters available, including:

- Promotion measures, including those involved in calculations

- Promotion aggregate measures
- Promotion attributes
- Promotion dimensions and levels

Promotion Measures

APCC stores promotion data at the Item level. The three tables below list the promotion measures you require:

- Detail promotion measures
- Detail promotion measures that are used in the calculations of aggregate measures in S&OP
- Aggregate promotion levels

Note: The Organization dimension is not always part of a Demantra PTP implementation.

Detail Promotion Measures in the Trade Analyst and RT S&OP Dashboards

The table below lists the detail promotion measures in the Trade Analyst dashboard and the RT S&OP dashboard.

Measure	Dimensions	Comments
Promoted Price	Promotion, Tactic, Product, Org, Retailer, Time	Sale price of a promoted item/org for a retailer
List Price*	Product, Org, Retailer, Time	List price of a promoted item/org for a retailer
Shelf Price	Product, Org, Retailer, Time	Shelf price of a promoted item/org for a retailer
Sale Price	Product, Org, Retailer, Time	Similar to Promoted Price but Sale Price does not vary by Promotion
Lift	Promotion, Tactic, Product, Org, Retailer, Time	Lift in sales due to promotion

Fixed Cost*	Promotion, Tactic, Product, Org, Retailer, Time	Vehicle cost for the promotion
Buydown*	Promotion, Tactic, Product, Org, Retailer, Time	Buydown spend for the promotion
Event Spend*	Promotion, Tactic, Product, Org, Retailer, Time	Total planned spending for promotion, sum of buydown, vehicle costs, and slotting
Manufacturer Profit	Promotion, Tactic, Product, Org, Retailer, Time	Manufacturer's profit from the event
Incremental Manufacturer Profit*	Promotion, Tactic, Product, Org, Retailer, Time	Incremental profit to the manufacturer due to the promotion
CPIU*	Promotion, Tactic, Product, Org, Retailer, Time	Event cost per incremental unit sold as a result of the promotion
% Spend	Promotion, Tactic, Product, Org, Retailer, Time	Event spending, as a percentage of event sales
Promoted Price Planned	Promotion, Tactic, Product, Org, Retailer, Time	Planned Sale price of a promoted item/org for a retailer
Lift Planned	Promotion, Tactic, Product, Org, Retailer, Time	Planned Lift in sales due to promotion
Base Event Volume Planned*	Promotion, Tactic, Product, Org, Retailer, Time	Planned Expected base volume without a promotion
Incremental Event Volume Planned	Promotion, Tactic, Product, Org, Retailer, Time	Planned Incremental volume due to the promotion
Total Event Volume Planned	Promotion, Tactic, Product, Org, Retailer, Time	Planned Total volume of the promotion
Base Event Value Planned	Promotion, Tactic, Product, Org, Retailer, Time	Planned Expected base value without a promotion

Incremental Event Value Planned*	Promotion, Tactic, Product, Org, Retailer, Time	Planned Incremental value due to the promotion, expressed as a currency
Total Event Value Planned*	Promotion, Tactic, Product, Org, Retailer, Time	Planned Total value of the promotion
Event Spend Planned*	Promotion, Tactic, Product, Org, Retailer, Time	Planned Total planned spending for promotion, sum of buydown, vehicle costs, and slotting
Mfg Profit Planned	Promotion, Tactic, Product, Org, Retailer, Time	Planned Manufacturer's profit from the event
Incremental Manufacturing Profit Planned *	Promotion, Tactic, Product, Org, Retailer, Time	Planned Incremental profit to the manufacturer due to the promotion
CPIU Planned*	Promotion, Tactic, Product, Org, Retailer, Time	Planned Event cost per incremental unit sold as a result of the promotion
% Spend Planned	Promotion, Tactic, Product, Org, Retailer, Time	Planned Event spending, as a percentage of event sales
Net Incremental Manufacturer Profit	Promotion, Tactic, Product, Org, Retailer, Time	Net incremental profit for the manufacturer, after considering cannibalization and pre- and post-effects
Price Decrease Level	Promotion, Tactic, Product, Org, Retailer, Time	Calculated as: $\left(\frac{\text{Shelf Price} - \text{Promoted Price}}{\text{Promoted Price}} \right) * 100$ rounded to nearest 5%
Price Discount Percentage	Promotion, Tactic, Product, Org, Retailer, Time	Calculated as: $\left(\frac{\text{Shelf Price} - \text{Promoted Price}}{\text{Promoted Price}} \right) * 100$
Incremental Event Value*	N/A	N/A
Manufacturer List Price*	N/A	N/A

Manufacturer Profit Planned	N/A	N/A
Regular Non-Promoted Price*	N/A	N/A
Regular Price*	N/A	N/A
Total Event Value*	N/A	N/A

* Measure is available in reporting currency.

1.4.2.3 Detail Promotion Measures Used in Calculations of Aggregate Measures in S&OP

The following table lists the detail promotion measures used in the calculations of aggregate measures in S&OP.

Measure Used in Calculations	Dimensions	Comments
Base Event Volume	Promotion, Tactic, Product, Org, Retailer, Time	Expected base volume without a promotion
Incremental Event Volume	Promotion, Tactic, Product, Org, Retailer, Time	Incremental volume due to the promotion
Total Event Volume	Promotion, Tactic, Product, Org, Retailer, Time	Total volume of the promotion
Base Event Value*	Promotion, Tactic, Product, Org, Retailer, Time	Expected base value without a promotion
Incremental Event Value*	Promotion, Tactic, Product, Org, Retailer, Time	Incremental value due to the promotion, expressed as a currency
Total Event Value*	Promotion, Tactic, Product, Org, Retailer, Time	Total value of the promotion
Promotional Cannibalization Volume Forecast	Promotion, Tactic, Product, Org, Retailer, Time	Reduction in volume to a non-promoted product as the result of a promotion

Promotional Cannibalization Value Forecast*	Promotion, Tactic, Product, Org, Retailer, Time	Reduction in revenue to a non-promoted product as the result of a promotion
Promotional Pre-Post Effect Volume Forecast	Promotion, Tactic, Product, Org, Retailer, Time	Reduction in volume before or after a promotion
Promotional Pre-Post Effect Value Forecast*	Promotion, Tactic, Product, Org, Retailer, Time	Reduction in revenue before or after a promotion
Promotional Net Incremental Volume Forecast*	Promotion, Tactic, Product, Org, Retailer, Time	Promotional Incremental Volume adjusted for Cannibalization and Pre-Post Effect
Promotional Net Incremental Value Forecast*	Promotion, Tactic, Product, Org, Retailer, Time	Promotional Incremental Value adjusted for Cannibalization and Pre-Post Effect

* Measure is available in reporting currency.

The promotion measures, which are visible in the S&OP Analyst dashboard, are listed below:

- Base Volume
- Incremental Event Volume
- Total Event Volume
- Base Value*
- Incremental Event Value*
- Total Event Value
- Manufacturer List Price*
- Regular Price*
- Promoted Price*
- Promotional Cannibalization Volume Forecast
- Promotional Cannibalization Value Forecast*

- Promotional Pre-Post Effect Volume Forecast
- Promotional Pre-Post Effect Value Forecast*
- Promotional Net Incremental Value Forecast*

* Measure is available in reporting currency.

1.4.2.4 Aggregate Promotion Measures in APCC

The table below lists the aggregate promotion measures in APCC.

Measure	Dimensions	Comments
List Price	Product, Org, Retailer, Time	List price of a promoted item/org for a retailer
Shelf Price	Product, Org, Retailer, Time	Shelf price of a promoted item/org for a retailer
Sale Price	Product, Org, Retailer, Time	Similar to Promoted Price but Sale Price does not vary by Promotion.
Base Volume	Product, Org, Retailer, Time	Expected base volume without a promotion activityd to Item, Org, Cust, Week.
Incremental Event Volume	Product, Org, Retailer, Time	Incremental volume due to the promotiond to Item, Org, Cust, Week.
Total Event Volume	Product, Org, Retailer, Time	Total volume of the promotiond to Item, Org, Cust, Week.
Base Value	Product, Org, Retailer, Time	Expected base value without a promotiond to Item, Org, Cust, Week
Incremental Event Value	Product, Org, Retailer, Time	Incremental value due to the promotion, expressed as a currencyd to Item, Org, Cust, Week

Total Event Value	Product, Org, Retailer, Time	Total value of the promotiond to Item, Org, Cust, Week
Promotional Cannibalization Volume Forecast	Promotion, Tactic, Product, Org, Retailer, Time	Reduction in volume to a non-promoted product as the result of a promotiond to Item, Org, Cust, Week
Promotional Cannibalization Value Forecast	Product, Org, Retailer, Time	Reduction in revenue to a non-promoted product as the result of a promotiond to Item, Org, Cust, Week
Promotional Pre-Post Effect Volume Forecast	Product, Org, Retailer, Time	Reduction in volume before or after a promotiond to Item, Org, Cust, Week
Promotional Pre-Post Effect Value Forecast	Product, Org, Retailer, Time	Reduction in revenue before or after a promotiond to Item, Org, Cust, Week
Promotional Net Incremental Volume Forecast	Product, Org, Retailer, Time	Promotional Incremental Volume adjusted for Cannibalization and Pre-Post Effectd to Item, Org, Cust, Week
Promotional Net Incremental Value Forecast	Product, Org, Retailer, Time	Promotional Incremental Value adjusted for Cannibalization and Pre-Post Effectd to Item, Org, Cust, Week

The aggregated promotion measures, listed below, are visible in the Answers area of the S&OP Analyst dashboard.

- Base Event Volume Aggregat
- Incremental Event Volume Aggregate
- Total Event Volume Aggregate
- Base Event Value Aggregate
- Incremental Event Value Aggregate

- Total Event Value Aggregate
- Promotional Cannibalization Volume Forecast Aggregate
- Promotional Cannibalization Value Forecast Aggregate
- Promotional Pre-Post Effect Volume Forecast Aggregate
- Promotional Pre-Post Effect Value Forecast Aggregate
- Promotional Net Incremental Volume Forecast Aggregate
- Promotional Net Incremental Value Forecast Aggregate

There are two additional Dimensions and levels:

- Promotion Plan: a group of promotions
- Promotion Group, also called Promoted Product Group (PPG). This is a group of Items commonly promoted together. In Demantra, Promotion Groups are part of the product hierarchy (a parent of Item) and do not vary over time.

Understanding Promotion Analysis Reports and Graphs

You can view promotion information by Item, Tactic, Promotion, or Customer. Within these categories, can navigate or drill down to seeded promotion analysis and view seeded graphs. These reports and graphs let you

- Review promotions by retailer
- Review by groups of items promoted together
- Review by promotion tactic
- Review promotion tactic effectiveness by price and promotion group
- Review by top or bottom performers based on lift, profit, or cost
- Compare the base plan to one or more other plans

Seeded Tables

Table	Navigate to/Drill to
Promotion by Retailer	Detail by Retailer of Promotion Group

Report by Promotion	Promotion by Promoted Group
Promotion by Tactic	Promotion by Promoted Group
Incremental Sales by Price Point	Detail by Retailer of Promotion Group
Tactic Effectiveness by Promotion Group	Detail by Promotion Group
Life Decomposition by Promotion	Detail by Customer
Compare Plans	

Seeded Graphs

The seeded graphs are:

- Incremental Sales by Price Point
- Tactic & Price
- Tactic Effectiveness by Promotion Group
- Life Decomposition by Promotion
- Top Promotions by CPIU
- Bottom Promotions by CPIU
- Top Promotions by Lift
- Bottom Promotions by Lift
- Top Promotions by Net Incremental Profit
- Bottom Promotions by Net Incremental Profit
- Compare Plan

Analyzing Promotion

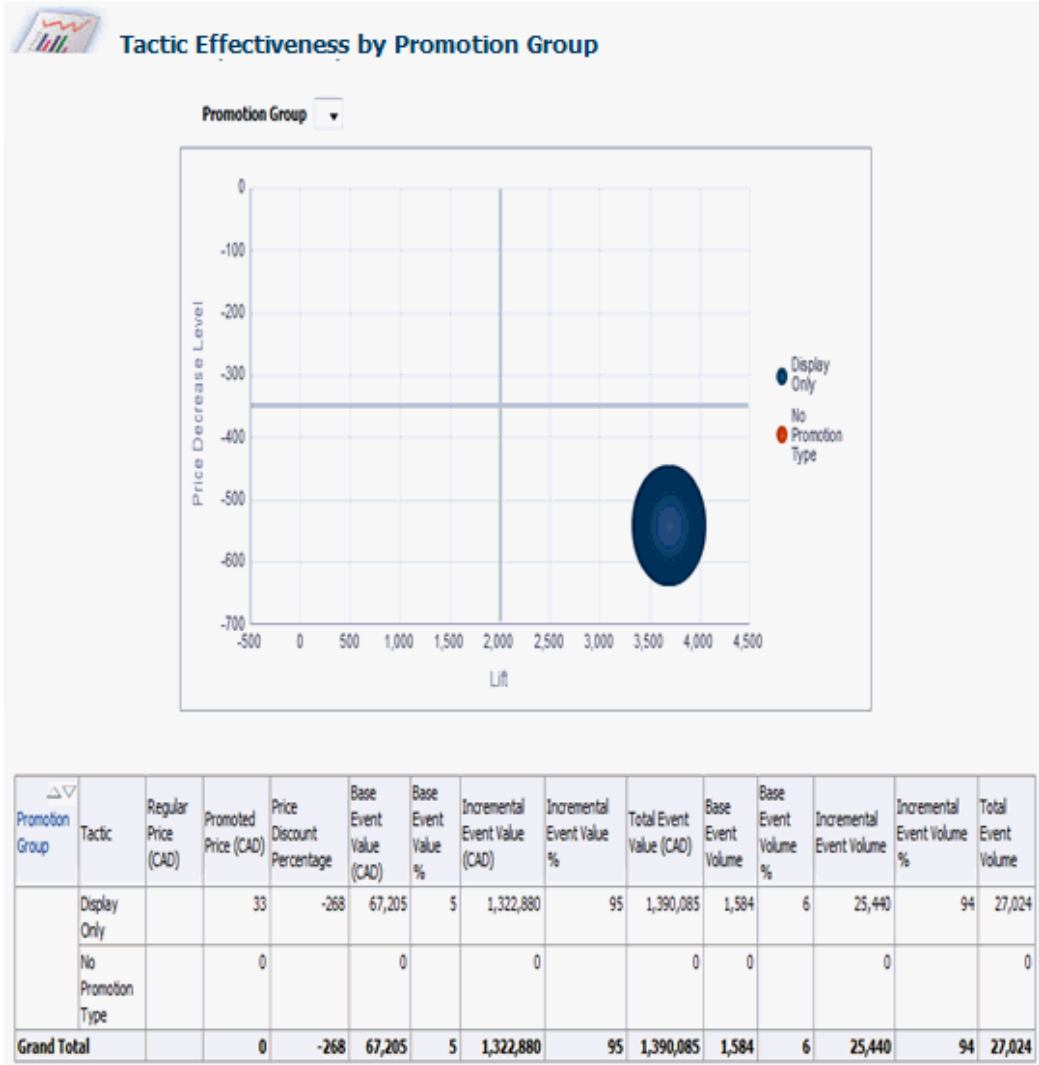
There are several reports you can create to look at the effectiveness of your promotion. You can analyze it by tactic, the time of year you ran it, the product, the retailer, and so on, or you may want to assess the tactic and percent price decrease to show the most and least effective combination. Each tab on the Trade Analyst dashboard lets you choose the entities you wish to see in your report or graph.

This section provides examples of some of the numerous reports and graphs you can create.

Tactic and Price Graph

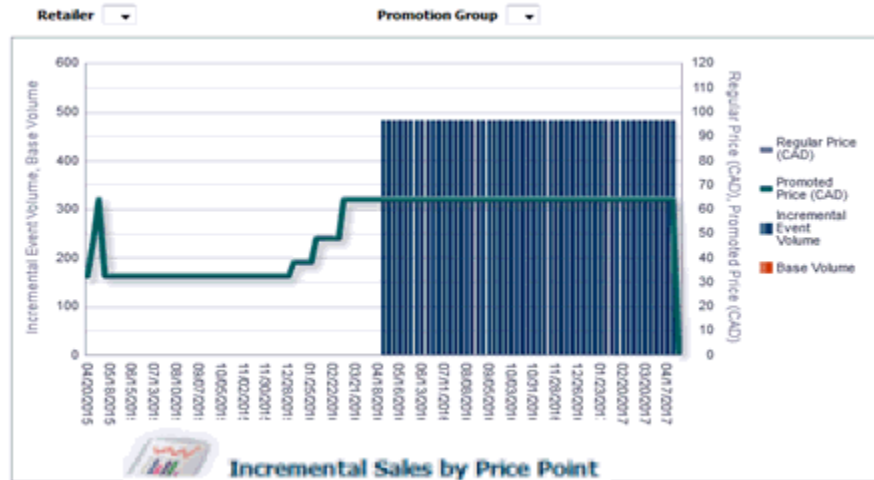


Tactic Effectiveness by Promotion Group Graph and Corresponding Report



Incremental Sales by Price Point Graph & Report

Incremental Sales by Price Point and Promotion report and graph appear within the same page layout.



The corresponding report shows the baseline and incremental sales by price point.

Drill to detail by Retailer or detail for the Items in the Promotion Group

Week	Regular Price (CAD)	Promoted Price (CAD)	Base Value (CAD)	Incremental Event Value (CAD)	Total Event Value (CAD)	Incremental Event Value %	Base Volume	Incremental Event Volume	Total Event Volume	Incremental Event Volume %
Grand Total			0	1,322,488	1,396,085	95	25,488	22,024	94	
04/20/2015	33	33	0	382	0	0	14	0	14	0
04/27/2015	33	33	0	382	0	0	14	0	14	0
05/04/2015	33	33	0	382	0	0	14	0	14	0
05/11/2015	33	33	0	382	0	0	14	0	14	0
05/18/2015	33	33	0	382	0	0	14	0	14	0
05/25/2015	33	33	0	382	0	0	14	0	14	0
06/01/2015	33	33	0	382	0	0	14	0	14	0
06/08/2015	33	33	0	382	0	0	14	0	14	0
06/15/2015	33	33	0	382	0	0	14	0	14	0
06/22/2015	33	33	0	382	0	0	14	0	14	0
06/29/2015	33	33	0	382	0	0	14	0	14	0
07/06/2015	33	33	0	382	0	0	14	0	14	0
07/13/2015	33	33	0	382	0	0	14	0	14	0
07/20/2015	33	33	0	382	0	0	14	0	14	0
07/27/2015	33	33	0	382	0	0	14	0	14	0
08/03/2015	33	33	0	382	0	0	14	0	14	0
08/10/2015	33	33	0	382	0	0	14	0	14	0
08/17/2015	33	33	0	382	0	0	14	0	14	0
08/24/2015	33	33	0	382	0	0	14	0	14	0
09/01/2015	33	33	0	382	0	0	14	0	14	0

Top and Bottom Promotions

These graphs respectively show Top and Bottom Promotions by:

- CPIU
- Lift
- Net Incremental Manufacturer Profit



Promotion by Retailer

In this report, you can review details by retailer or details for the items in the promotion group by drilling down from the Retailer or Promotion Group columns, respectively.

Promotion by Retailer

Retailer	Promotion Plan	Promotion Name	Tactic	Promotion Group	Promoted Price (CAD)	Base Event Volume	Incremental Event Volume	Total Event Volume
		Display Only			33	1,564	25,440	27,004
		No Promotion Type			0	0	0	0

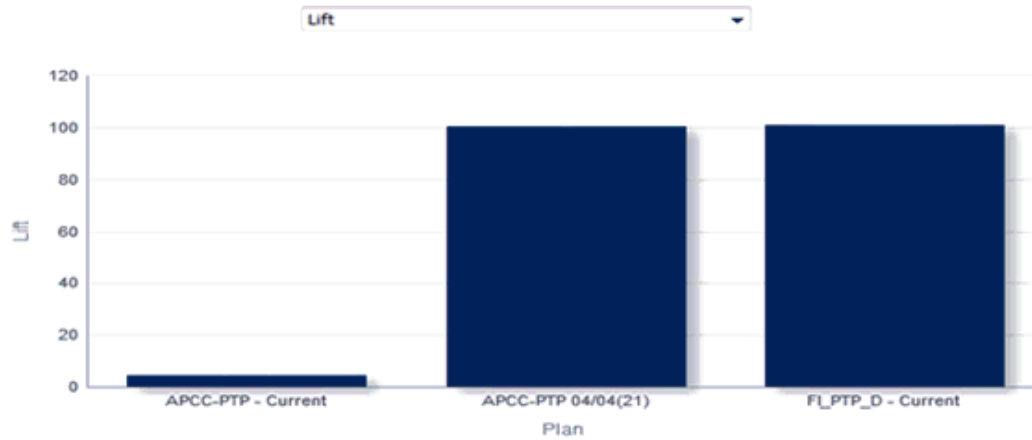
Lift Decomposition by Promotion Graph and Report

This example shows the Lift Decomposition by Promotion graph followed by the corresponding report.



Compare Plans

This example shows the Compare Plan graph followed by the corresponding report.



	APCC-PTP - Current	APCC-PTP 04/04(21)	FI_PTP_D - Current
Base Value (CAD)			
Incremental Event Value (CAD)	236,340		
Total Event Value (CAD)	288,779		
Promotional Cannibalization Value Forecast (CAD)	-157,560		
Promotional Pre-Post Effect Value Forecast (CAD)	-295,425		
Promotional Net Incremental Value Forecast (CAD)	689,325		
Lift	4	100	100
Event Spend (CAD)	131,598		
Manufacturer Profit (CAD)	157,181		
Incremental Manufacturer Profit (CAD)	104,742		
Net Incremental Manufacturer Profit (CAD)	557,727		

BPEL Processes

This appendix covers the following topics:

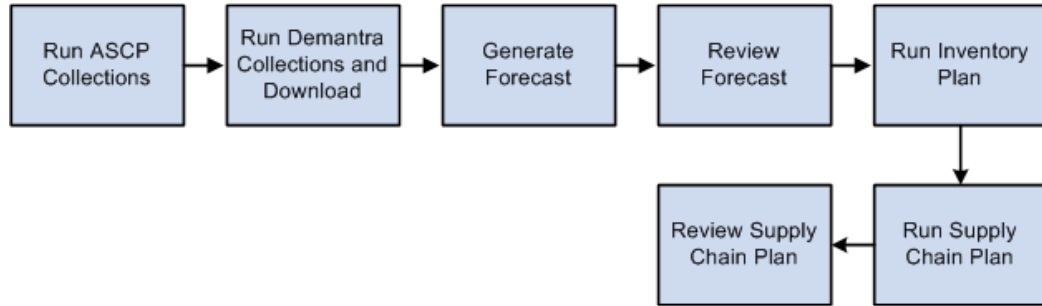
- The Forecast, Inventory, and Supply Planning Business Process
- The Sales and Operations Planning Business Process
- Custom Business Processes

The Forecast, Inventory, and Supply Planning Business Process

The sequence of the Forecast, Inventory, and Supply Planning subprocesses is:

1. Run the ASCP Collections subprocess.
2. Run the Demantra Collections and Download subprocess.
3. Launch the Forecast subprocess.
4. Review the Forecast subprocess.
5. Run the Inventory Plan subprocess.
6. Run the Supply Chain Plan subprocess.
7. Review the Supply Chain Plan subprocess.

This diagram illustrates the Forecast, Inventory, and Supply Planning business process:



Running the ASCP Collections Subprocess

The Forecast, Inventory, and Supply Planning business process flow starts with the ASCP Collections subprocess, and waits for it to finish. This subprocess begins by verifying that all detailed subprocesses and activities within the subprocess are executed.

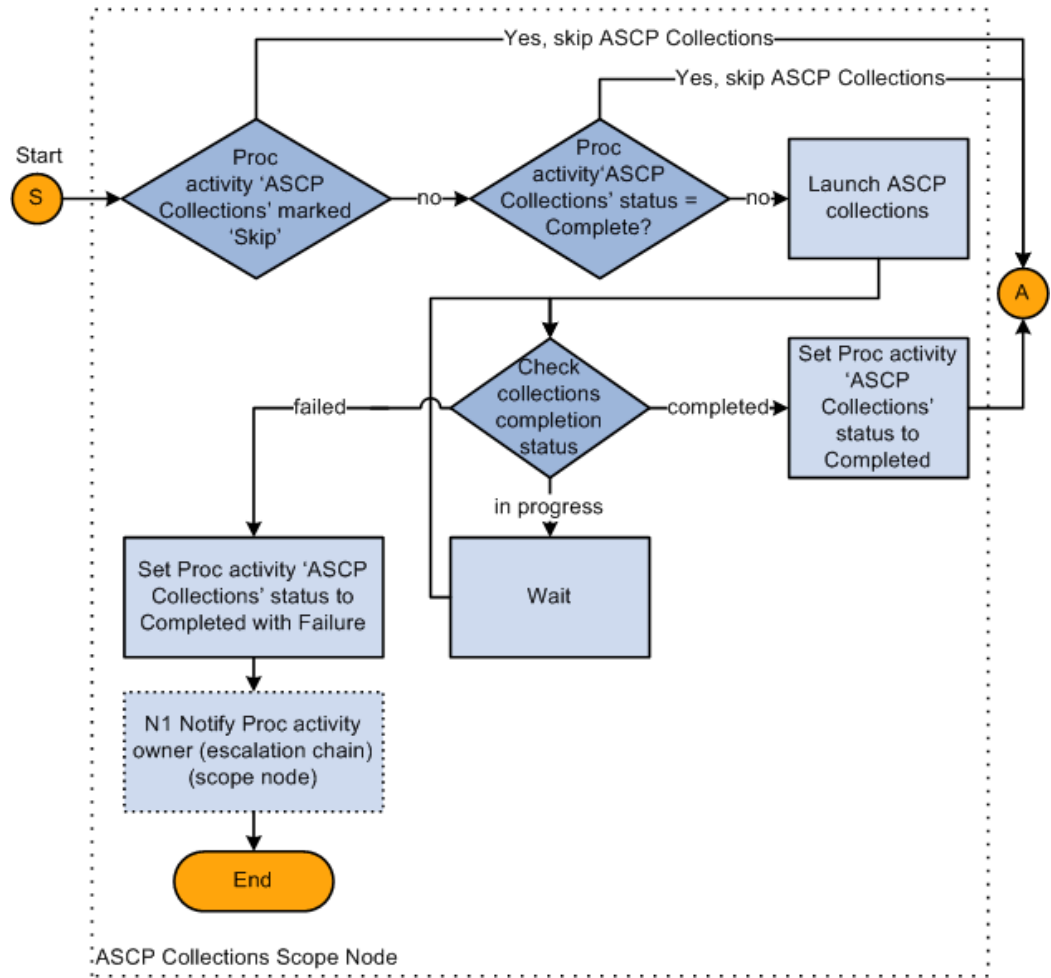
If the Skip check box is selected for an activity, the process bypasses that specific activity and proceeds with the next activity.

A user can do this if some planning process steps are not required for each planning cycle, for example, if forecasting and supply chain planning occur once every week, and inventory planning occurs once a month. In this case, the user can select the Skip check box for the Run Inventory Plan activity on the Planning Processes page for those planning cycles for which inventory optimization is not required.

See Accessing the Planning Processes Page, page 2-28

If an activity is complete, it is skipped. This may occur if a downstream activity goes into an error state, which halts the process. After the error is corrected, the process is relaunched. Depending on a user option, the process skips the completed activities and resumes with the first incomplete activity.

This diagram illustrates the Run ASCP Collections subprocess:



Understanding the Escalation Chain

The delivered BPEL processes use a two-tier escalation chain. Each activity can have a primary and an alternate owner. When the primary owner does not respond to a task within the time designated, ownership of the task transfers to the alternate owner.

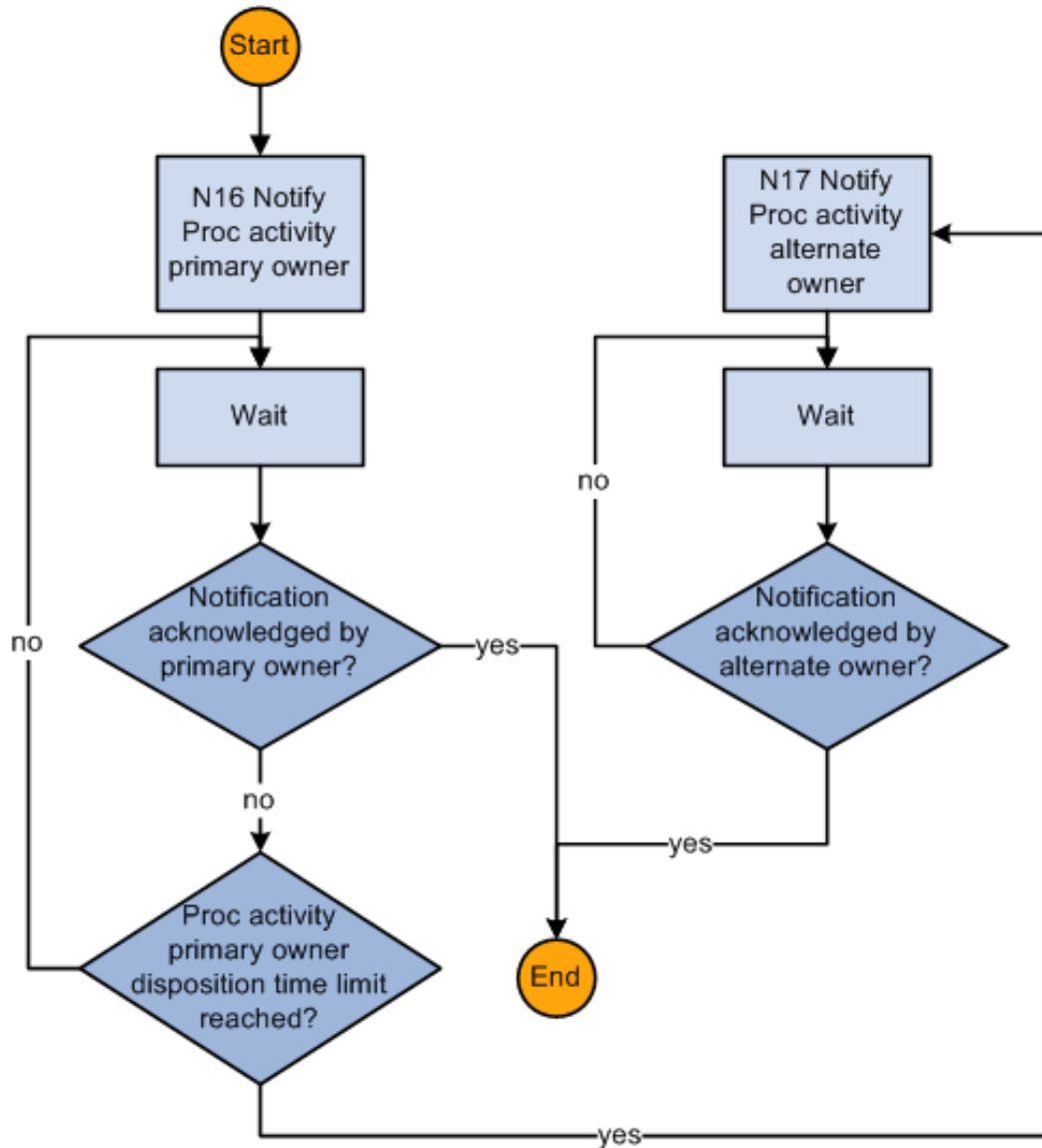
The primary owner, alternate owner, and designated due date are defined on the Process tab. See the Managing Scenarios chapter, Managing Scenarios section, Creating New Processes sub-section.

See Working with Planning Processes, page 2-28

For example, in the ASCP Collections subprocess, if the Collections activity goes into an error state, a notification is sent to the primary owner of the activity. If the primary owner does not acknowledge the error within the amount of time specified in the Finish by field, then a notification is sent to the alternate owner.

This logic is captured in the Notify Activity Owner (Escalation Chain) activity within the ASCP Collections subprocess.

This diagram illustrates the Notify Activity Owner subprocess:

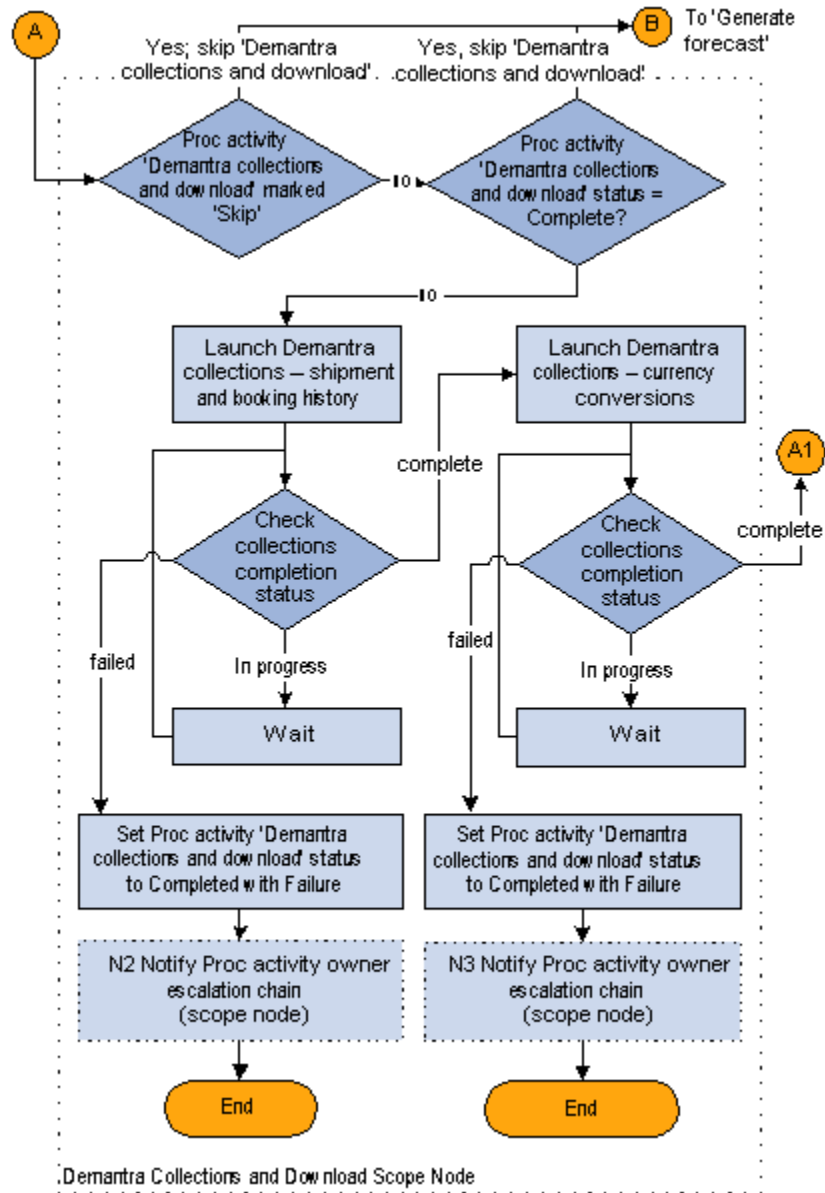


Running the Demantra Collections and Download Subprocess

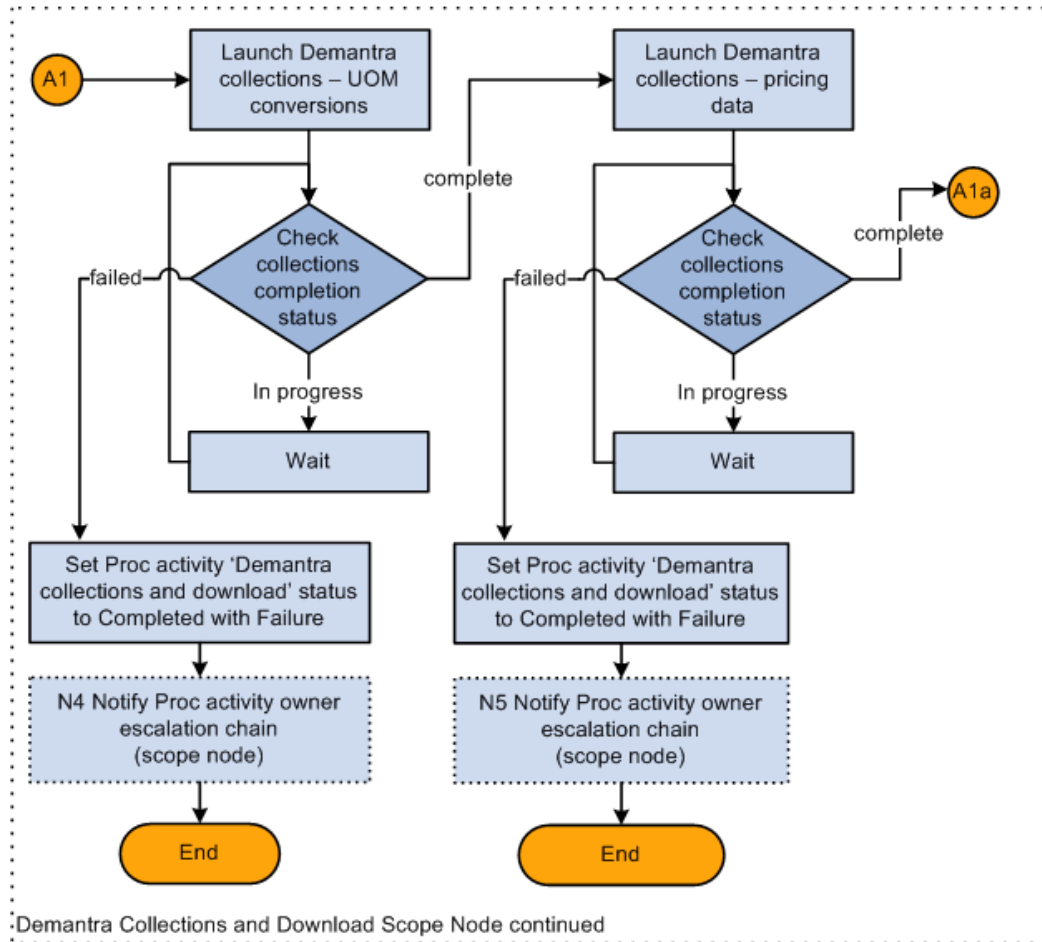
The Demantra Collections and Download subprocess begins when the ASCP Collections subprocess finishes. It executes a series of collection and download activities. It runs download activities by invoking Web services that exist in Demantra Demand Management workflows. This assumes that a generic Web service exists that takes a Demantra workflow name as a parameter and executes that workflow.

The BPEL process calls a Web service called Check Demantra Workflow Status, which determines when each download operation is complete. This assumes that a generic Web service exists that uses a Demantra workflow name as a parameter and returns the completed status of that workflow.

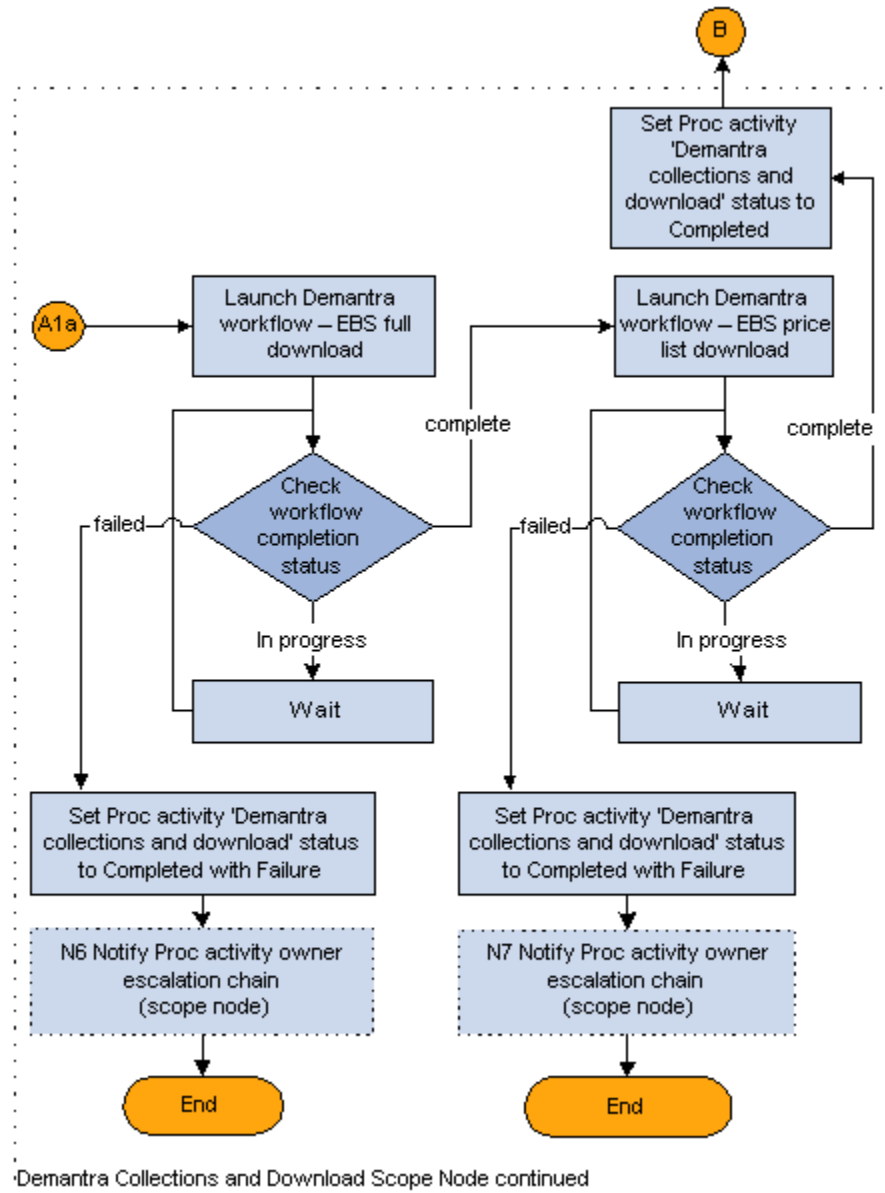
This is the first of three diagrams that illustrates the Run Demantra Collections and Download subprocess:



This is the second of three diagrams that illustrates the Run Demantra Collections and Download subprocess:



This is the final diagram that illustrates the Run Demantra Collections and Download subprocess:



Accessing Embedded Demantra Worksheets

This feature allows you to access and update a Demantra worksheet without having to leave the APCC application. It is a variation of the Demantra Anywhere functionality, which allows an external user to log into Demantra. Using standard worksheet functionality, you can make adjustments to historical data or the statistical forecast, run simulations, and save any changes.

Enabling Demantra Anywhere

To log in to the Demantra Anywhere process, you need an Oracle Single Sign On (SSO) and both applications must be registered with the same SSO server.

Configuring Demantra Anywhere

1. Disable OBIEE SSO, log in to Answers as Administrator.
2. Create a new report and save (for example) in the Shared/Others folder.
3. Add Scenario, Item, Organization, Budget, and Budget
4. Change second Budget formula to:

```
'< a  
href="'||valueof(NQ_SESSION.APPS_SERVLET_AGENT)||'/MscObieeSrvlt?Par  
amType=Name&Wnd=DMA&QueryName=Export OBI  
Data&CombinationName=Item, '||"- Item".Item||';Demand Class, '||"-  
Demand Class"."Demand Class"||';Organization, '||"-  
Organization"."Organization Code"||'"> >) > < /a> '
```

5. Set the data format to HTML.
6. Add narrative view with following content as prefix:

```
<a  
href="@{biServer.variables["NQ_SESSION.APPS_SERVLET_AGENT"]}/MscObie  
eSrvlt?ParamType=Name&=DMA&queryName=Export OBI Data"> Export OBI  
Data< /a>
```

After creating the custom report, you can run the report as described below.

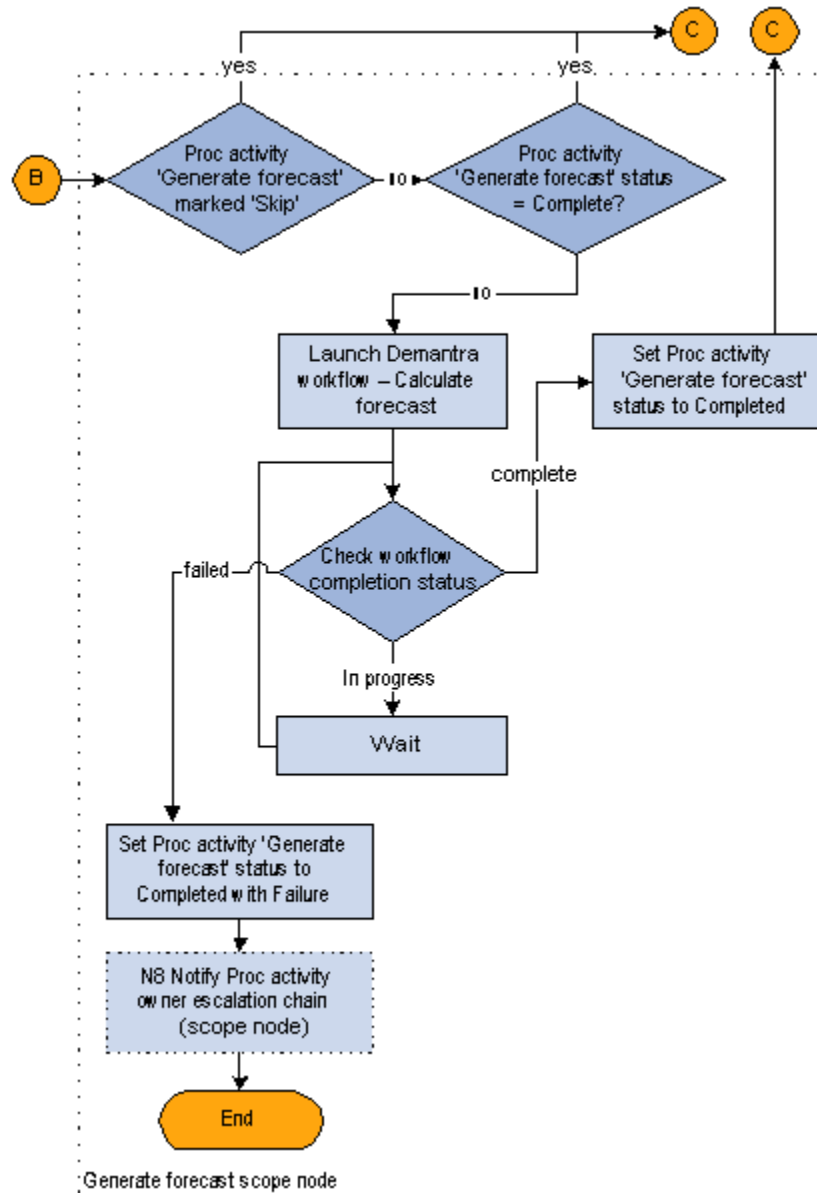
Running the Report

To run the custom report, first enable OBIEE SSO, then open the report from any of the dashboards (for example, the Sales and Operations Dashboard). There is no limit on which applications can use embedded Demantra as long as they have the same SSO and can pass the relevant URL and context. The internal syntax for each application may differ in order to formulate the correct call to Demantra.

Generating the Forecast Subprocess

The Generate the Forecast subprocess launches the Calculate Forecast workflow in Demantra Demand Management. This subprocess is the first half of the Forecast Calculation and Approval workflow.

This diagram illustrates the Generate Forecast subprocess:



Reviewing the Forecast Subprocess

The Reviewing the Forecast subprocess launches the Approve Forecast workflow in Demantra Demand Management. This subprocess is the second half of the Forecast Calculation and Approval workflow.

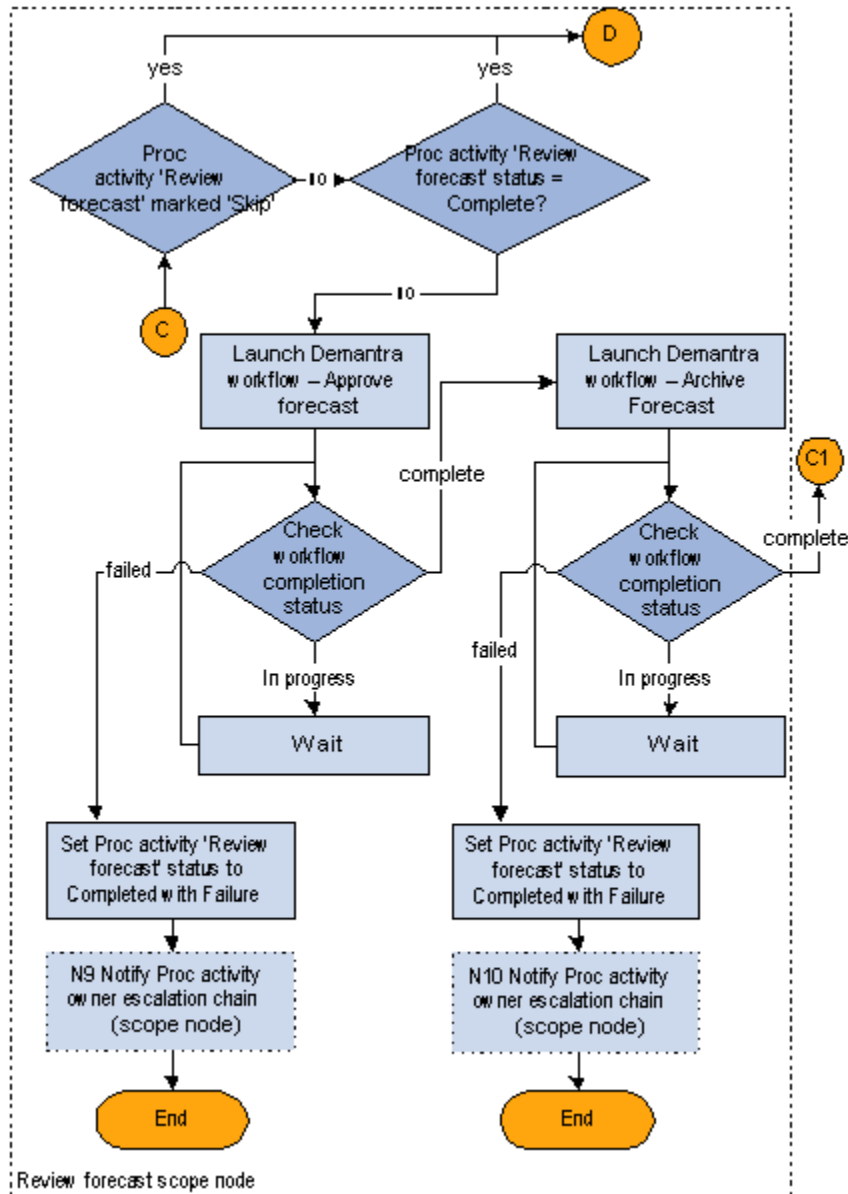
When the Approve Forecast workflow finishes in Demantra Demand Management, the final forecast is automatically archived and uploaded to the planning server.

The **Assign plan name to Demantra forecast output** subprocess invokes a service that changes the demand scenario name of the uploaded Demantra output from that of the export integration profile to a name of the user's choosing. The user specifies this name

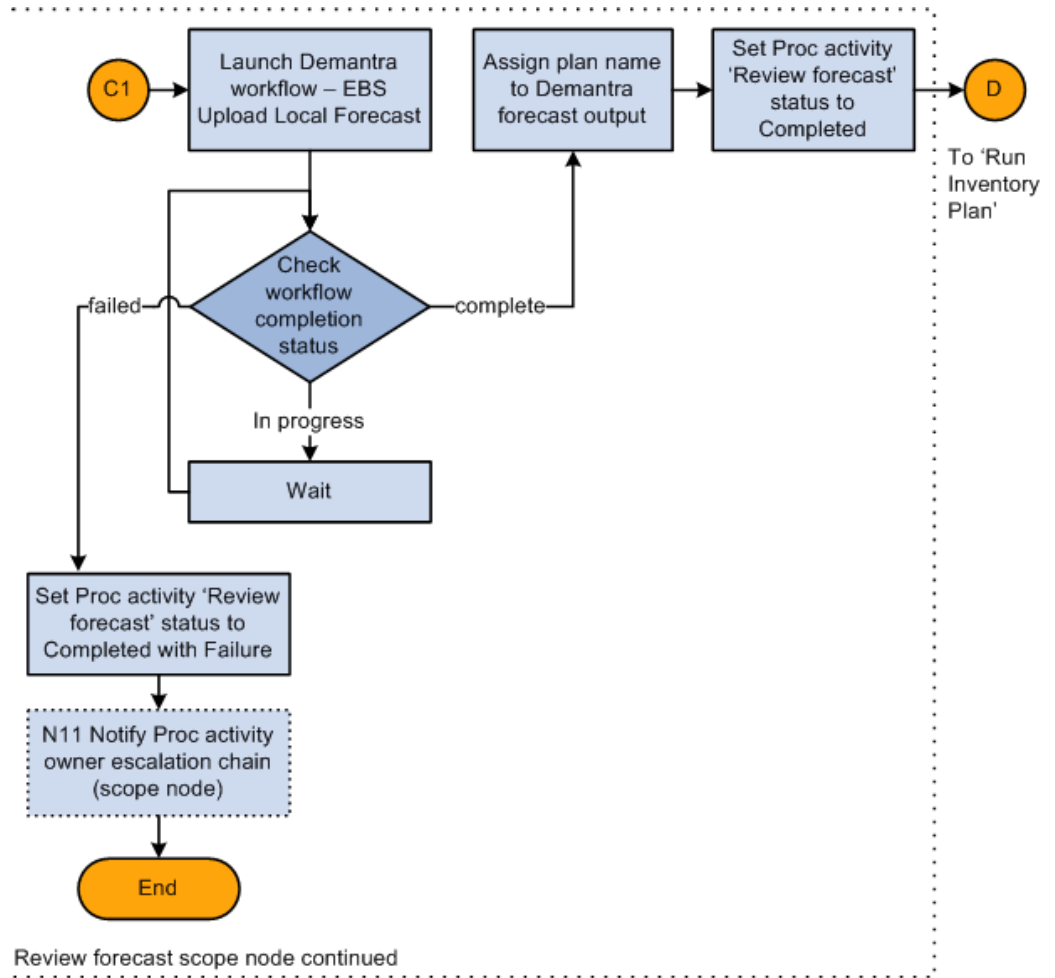
in the process user interface. This covers the case in which multiple scenarios are being executed during the course of sales and operations planning.

This process is not applicable anymore other than to ensure backwards compatibility and to support the Demantra Web Service profile.

This is the first of two diagrams that illustrate the Review Forecast subprocess:

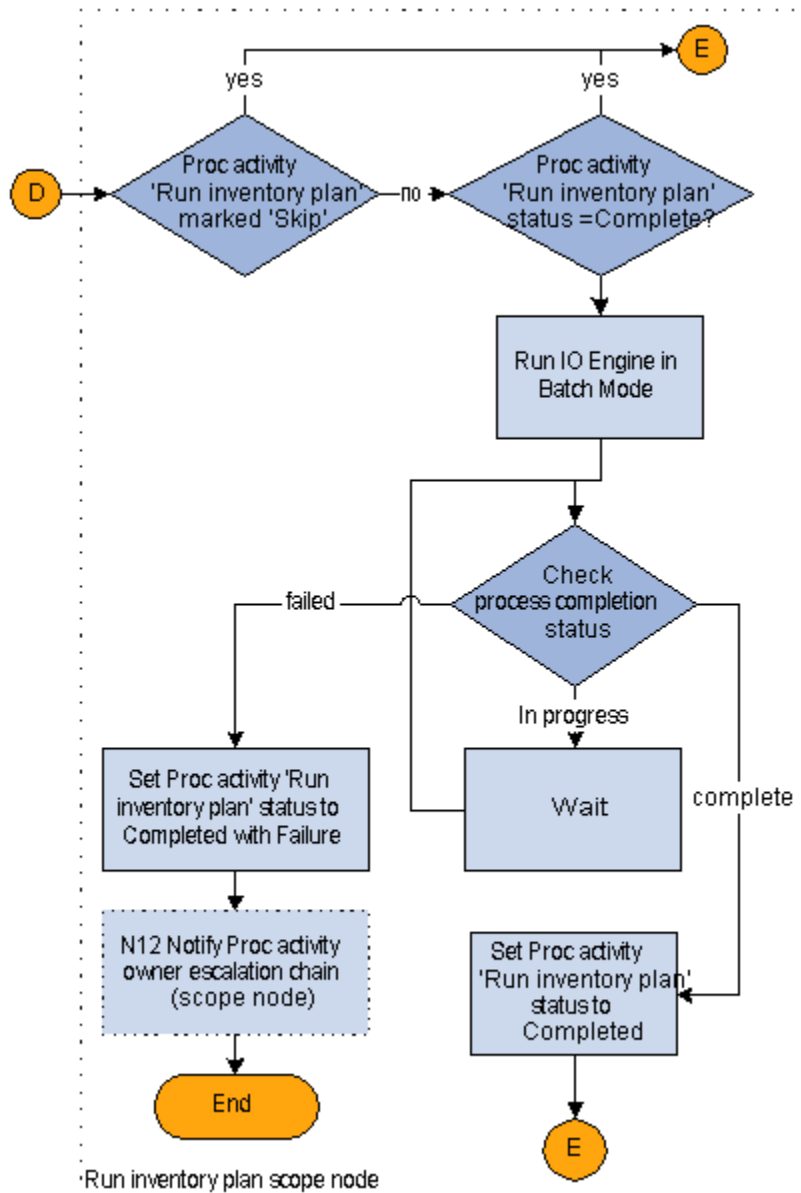


This is the final diagram that illustrates the Review Forecast subprocess:



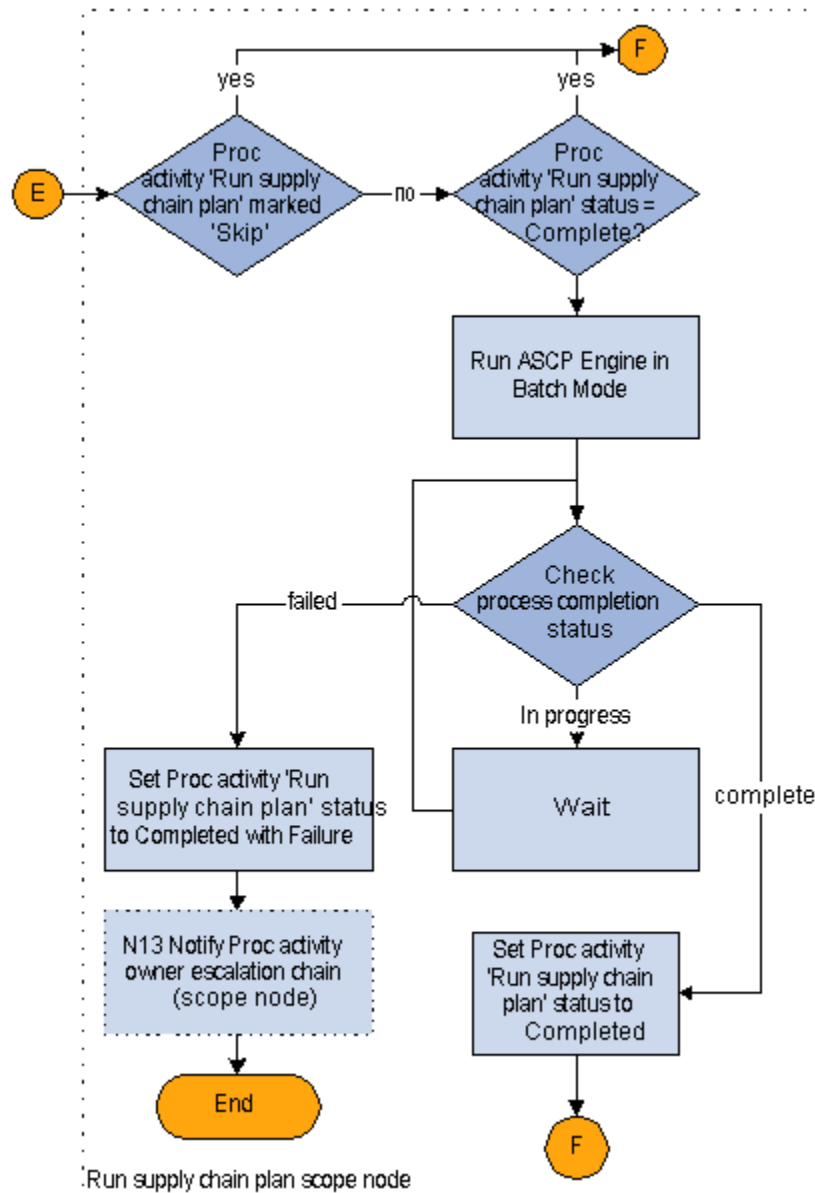
Running the Inventory Plan Subprocess

This diagram illustrates the Run Inventory Plan subprocess:



Running the Supply Chain Plan Subprocess

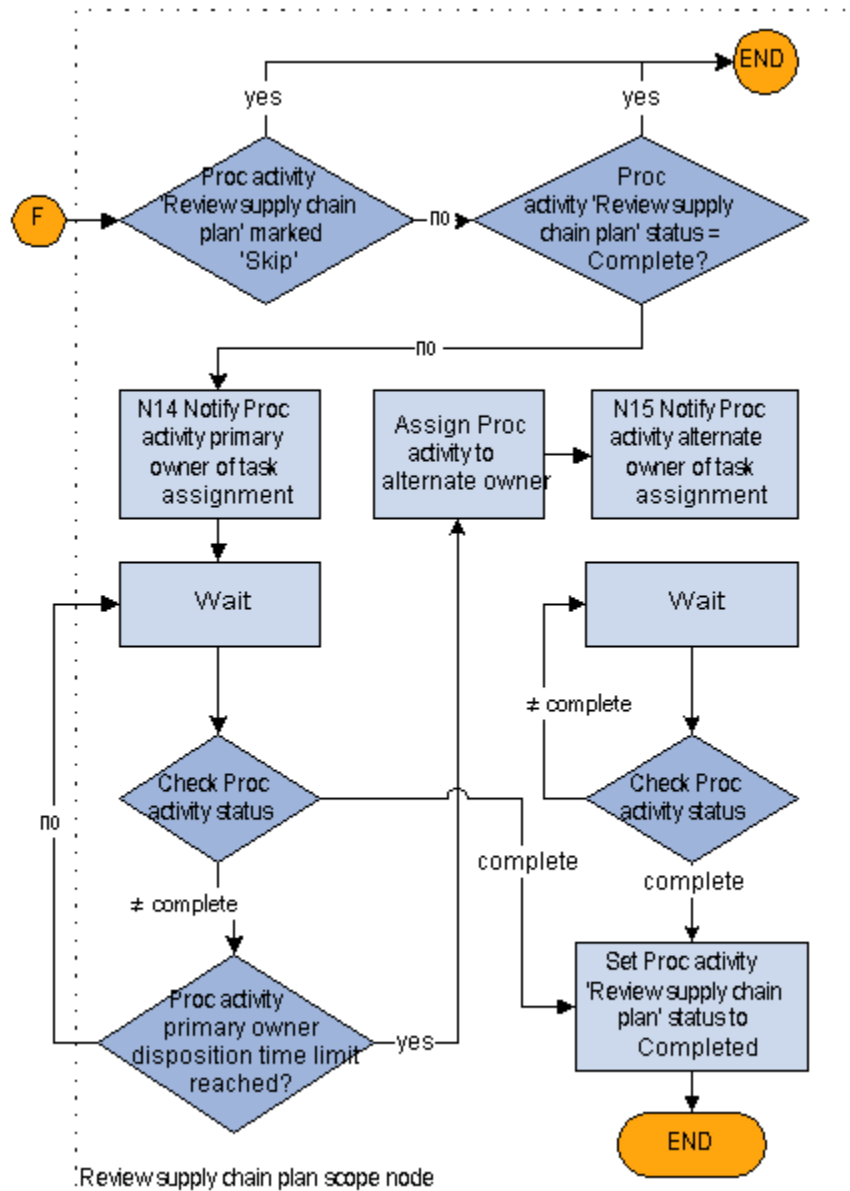
This diagram illustrates the Run Supply Chain Plan subprocess:



Reviewing the Supply Chain Plan Subprocess

The Review Supply Chain Plan subprocess notifies the owner of the activity to access the ASCP application to verify, change, and release the results. The escalation logic is executed if the primary owner does not respond to the notification within the amount of time specified in the Finish by field of the activity.

This diagram illustrates the Review Supply Chain Plan subprocess:



The Sales and Operations Planning Business Process

The sequence of the Sales and Operations Planning subprocesses is:

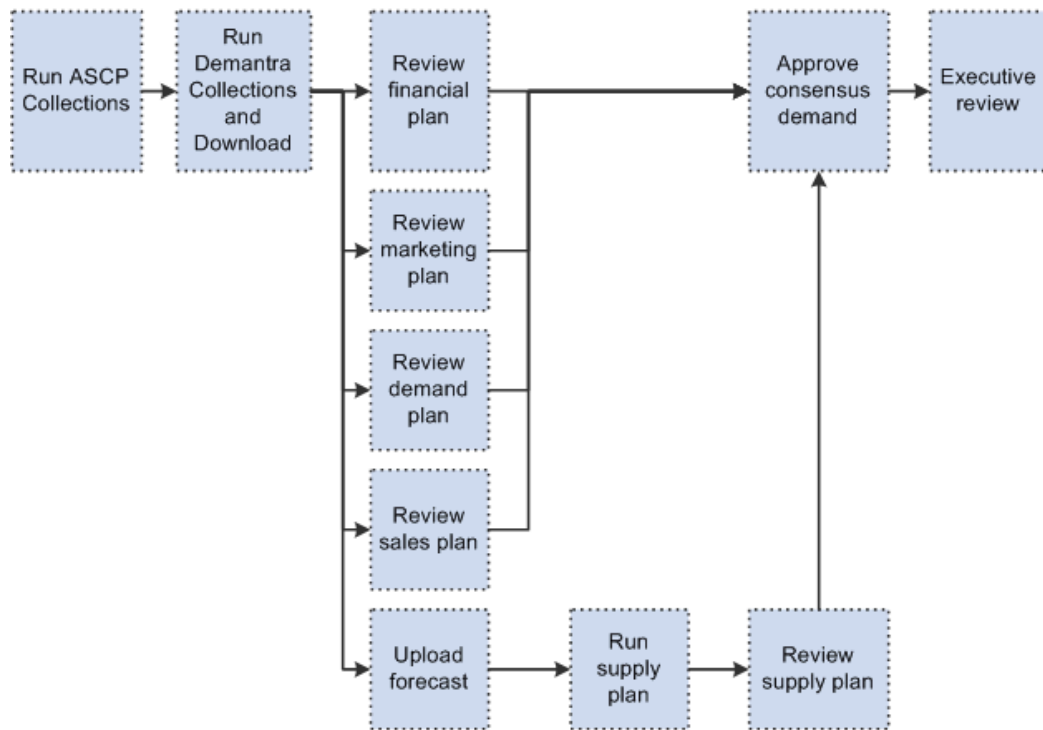
1. Run the ASCP Collections subprocess.
2. Run the Demantra Collections and Download subprocess.
3. Review the Financial Plan subprocess.
4. Review the Marketing Plan subprocess.

5. Review the Demand Plan subprocess.
6. Review the Sales Plan subprocess.
7. Upload the Forecast subprocess.
8. Run the Supply Plan subprocess.
9. Review the Supply Plan subprocess.
10. Approve the Consensus Demand subprocess.
11. Run an Executive Review subprocess.

Note: APCC supports a custom product hierarchy from Demantra DM and custom series from Demantra DM and RTS & OP. APCC also supports plan-specific forecasting measures. For more information, refer to the chapter *Demantra Integration with Advanced Planning Command Center* in the *Oracle Demantra Implementation Guide*.

This diagram illustrates the Sales and Operations Planning business process:

Sales and Operations Planning BPEL Process



The basic structure of most subprocesses is similar to those of the Forecast, Inventory, and Supply Planning BPEL process. See BPEL Processes appendix, The Forecast, Inventory, and Supply Planning Business Process section.

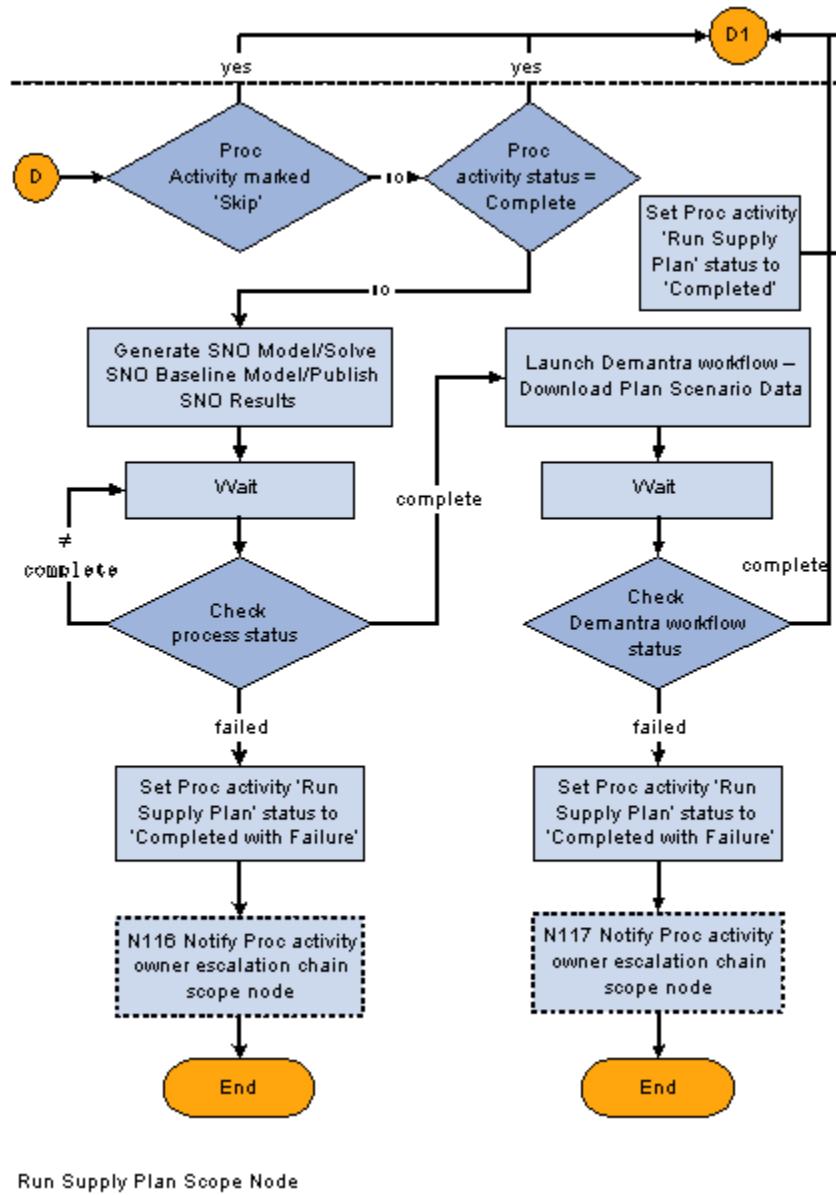
See The Forecast, Inventory, and Supply Planning Business Process, page A-1

Running the Supply Plan Subprocess

The Run Supply Plan subprocess uses Oracle's Strategic Network Optimization (SNO) application as the supply plan evaluation engine. The Sales and Operations Planning BPEL process automates the Real Time (RT) - Sales and Operations Planning to SNO to RT-Sales and Operations Planning cycle.

The Download Plan Scenario Data step requires a service, which can launch an existing workflow in Demantra Demand Management with a level member context.

This diagram illustrates the Run Supply Plan subprocess:



Custom Business Processes

In addition to the two seeded business processes that are described earlier in this appendix, Oracle Advanced Planning Command Center also enables users to model a custom business process to meet specific needs by using any of the seeded web services. This is accomplished by means of BPEL designer. The Web service operations that can be used are listed in the following table:

Release ASCP Recommendations	Upload Demand
Run ASCP Engine in Batch Mode	Upload Demand Class
Set ASCP Plan Options	Upload Demand Schedule/Supply Schedule
Run ASCP Collections	Upload Item
Run Demantra Collections - Currency Conversions	Upload Item Categories
Run Demantra Collections - Pricing Data	Upload Item Customer Mapping
Run Demantra Collections - Returns History	Upload Item Substitutes
Run Demantra Collections - SCI Data	Upload Item Supplier Flex Fence
Run Demantra Collections - Shipment and Booking History	Upload Job Operation Network
Run Demantra Collections - UOM Conversions	Upload Job Operation Resource
Run ODS Load	Upload Job Operation Resource Instance
Release DRP Results	Upload Job Operations
Run DRP Engine in Batch Mode	Upload Job Resource Requirements
Set DRP Plan Options	Upload Jobs
Run IO Engine in Batch Mode	Upload Location
Set IO Plan Options	Upload Manufacturing Resource
Get Promise Date	Upload Manufacturing Resource Instance
Copy Plan	Upload Network Routings
Purge Plan	Upload Order Types
Check Process Status	Upload Planner

Release SRP Results	Upload Planning Calendar
Run SRP Engine in Batch Mode	Upload Planning Calendar Dates
Set SRP Plan Options	Upload Planning Calendar Exceptions
Assign Plan Name	Upload Planning Calendar Period Start Date
Check Demantra Workflow Status	Upload Planning Calendar Shifts
Run Demantra Workflow	Upload Planning Calendar Week Start Dates
Run Demantra Workflow with Context	Upload Planning Calendar Workday Pattern
Terminate Demantra Workflow	Upload Planning Calendar Year Start Date
Notify user	Upload Planning Organization Parameters
Get Process Information	Upload Planning Shift Dates
Get Activity Information	Upload Planning Shift Exceptions
Get Parameter Values	Upload Planning Shift Times
Update Process	Upload Planning Shifts
Set Activity Status	Upload Planning Simulation Set
Generate SNO Model	Upload Project
Publish SNO Results	Upload Project Task
Download Forecast	Upload Region Site
Download Safety Stock	Upload Regions
Upload Forecast	Upload Reservations
Upload Planned Supply	Upload Resource Capacity
Upload Safety Stock	Upload Resource Group

Archive Plan	Upload Resource Instance Capacity
Archive Scenario	Upload Resource Instance Requirement
Upload Shipment and Booking History	Upload Resource Requirement
Create PO Acknowledgement	Upload Routing
Generate CP Exception	Upload Routing Operation Resources
Publish Order Forecast	Upload Routing Operation Sequence
Publish Supply Commit	Upload Routing Operations
Receive Supplier Capacity	Upload Sales Channels
Release CP Recommendations	Upload Sales Orders
Retrieve Exception from CP	Upload Serial Numbers
Retrieve Notifications from CP	Upload Shipment Method
Retrieve transactional data from CP	Upload Sourcing History
Retrieve VMI Status	Upload Sourcing Rule
Run VMI Engine	Upload Sourcing Rule Assignments
Upload Supplier Commit	Upload Sourcing Rule Details
Run Planning Data Pull	Upload Subinventory
Upload ABC Class	Upload Supplier Capacity
Upload Approved Supplier List	Upload Supply
Upload Available to Promise Rule	Upload Trading Partner Contacts
Upload Bill of Material	Upload Trading Partner Sites
Upload Bill of Material Component Substitutes	Upload Trading Partners

Upload Bill of Material Components	Upload Transportation Details
Upload Bill of Resource	Upload Unit Numbers
Upload Bills of Distribution	Upload Unit of Measure
Upload BIS KPI	Upload UOM Class Conversions
Upload Calendar Assignments	Upload UOM Conversion
Upload Carrier Service	Upload User Company Association
Upload Category Sets	Copy SNO Plan Options
Upload Co Products	Set SNO Plan Options
Upload Collaboration Security Rule	

All custom processes and activities that are built using these Web services must follow specific guidelines:

- Custom activities are self-contained and cannot accept parameters.
- Custom BPEL processes must follow a specific naming convention; the process name must start with 'APS'.

To deploy custom BPEL processes, you must:

1. Deploy the processes to the domain that is specified in the profile option MSC:BPEL Domain Name.
2. Run the concurrent program Read Planning Process Activities to import the process into the planning database.
3. Users can then use the Custom BPEL Process in the Scenario Management user interface to assign any new planning process.

APCC Standalone and Backport

This appendix covers the following topics:

- Overview of APCC Standalone and Backport Capabilities
- Dependencies and Interactions
- Backport and Standalone Configuration
- Profile Options
- Setups and Processes
- 12.1 Data Loads To and From APCC Fact Repository

Overview of APCC Standalone and Backport Capabilities

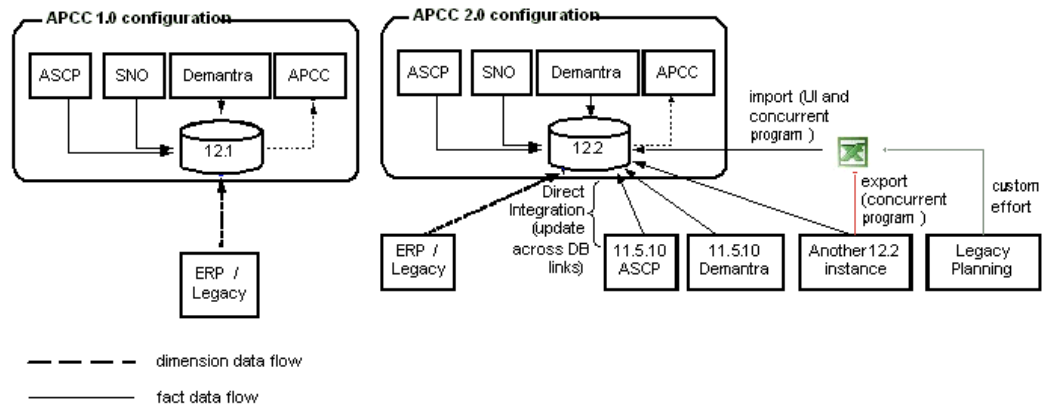
Oracle Advanced Planning Command Center integration with APS 11.5.10 enables users of 11.5.10 APS (ASCP, IO, or Demantra) to leverage key capabilities, such as:

- analytical capabilities
- plan archives
- scenario management

APCC provides a format for all your analytical and reporting requirements. It incorporates an open interface with which to feed external data into APCC's fact data repository. The integration of APCC with APS 11.5.10 allows legacy systems or third party planning systems, including Oracle Rapid Planning solutions that are deployed on different instances to use a single APCC repository.

This enables an out-of-the-box integration of an 11.5.10 APS instance with an APCC 12.2 instance.

The following diagram compares the configurations of APCC 1.0 and 2.0.



Setups and Processes

When setting up your standalone or backport system, two separate scenarios are possible:

- APCC version 12.1 or higher and APS on 11.5.10. In this scenario, drill-downs into Demantra, IO, and ASCP are not supported.
- APCC and APS are on the same instance, 12.1 or higher: In this scenario, drill-downs into Demantra, IO, and ASCP are supported.

Changed Setup Steps for IO and ASCP

1. In the Parameters window, turn on the Export to Advanced Planning Command Center plan launch parameter.
2. Run Archive Plan Summary concurrent program with two variations: All summarized fact data is updated across the database link in a 12.2 instance.

Note: A parameter, APCC Instance Code, is defaulted from the new profile MSC: APCC Instance. Demantra unpublished data historical facts or other forecast facts are not updated in the 12.2 instance.

3. On the destination instance, launch the program to re-compute the aggregates based on the archive plan summary.

Changed Setup Steps for Demantra

There is a new publish workflow, which, includes the ability to archive. The default is Yes.

Dependencies and Interactions

The integration of 11.5.10 and the standalone has some limitations. These include:

- If APCC is running on 12.1 or higher and APS is running on 11.5.10, the integration applies only to Oracle Demantra, Oracle Inventory Optimization (IO), and Oracle Advanced Supply Chain Planning (ASCP). Drill-downs into these applications are not supported. However, if APCC and APS are both running on the same instance, 12.1 or higher, drill-downs into Demantra, IO, and ASCP are supported
- The source/EBS instances must be configured correctly and collections must be run into both APS 11.5.10 and APCC 12.1 instances if the integration is to work successfully.
- The integration does not support Oracle Strategic Network Optimization (SNO).
- Planning Web Services and BPEL Processes are not enabled for these plans.

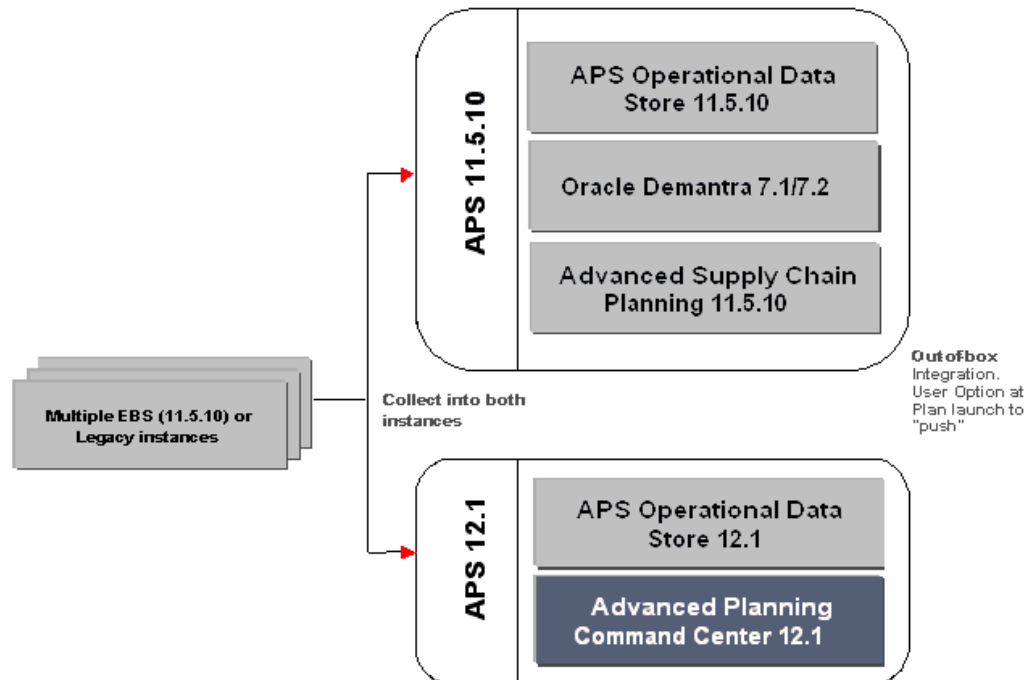
Backport and Standalone Configuration

To run 11.5.10 and the APCC standalone successfully, your instances must meet some key criteria. They are:

- APCC 12.1 instance must be configured to have the same source instances as are in the APS 11.5.10 instances, with the exact instance codes.
- On APS 11.5.10 instance, it is best if Demantra is version 7.2.0.2 for a complete integration. However, if you are integrating an earlier version integration would still work for Supply Chain (ASCP) related metrics but not for Sales & Operations Planning metrics or historical facts that are sourced from Demantra Real Time Sales & Operations Planning (RTS&OP).
- The collections must be run into both 12.1 and 11.5.10 instances.

Note: There is a new feature in APS 11.5.10 which automates this procedure by setting a new collections parameter, Synchronize Collected Data in R12.1 Instance, in the 11.5.10 instance.

The diagram below provides a high level view of the configuration:



Profile Options

Profile options for the backport and standalone versions of APCC must be set up as follows:

- **MSC: APCC Instance Code.** This profile options is used by the archive plan summary program to push the plan summary from the 11.5.10 Planning Server to the APCC Server. It needs to be set up only on the APS 11.5.10 Instance. The value of this profile option must be the name of the database link in the APS 11.5.10 instance that points to the APCC 12.1 instance.

The remaining profile options that are set up for APCC in the 12.1 instance must be replicated in the APS 11.5.10 instance with identical values:

- **MSC: APCC Calendar Code**
- **MSC: APCC Category Set 1**
- **MSC: APCC Category Set 2**
- **MSC: APCC Category Set 3**
- **MSC: APCC Currency Code**
- **MSC: APCC Period Set Name**

- MSC: APCC Instance Code
- The name of the database link in the 11.5.10 server to the 12.1 APCC instance. The Archive Plan Summary program uses this name to push the plan summary from the 11.5.10 Planning Server to the APCC Server. It needs to be set up only on the APS 11.5.10 instance.

For additional information about setting up profile options, refer to *Setting Up Profile Options* in Chapter 4 of this User's Guide.

Setups and Processes

There are two possible scenarios when you are setting up APCC backport or standalone:

- APCC instance is 12.1 or higher and APS instance is 11.5.10.
In this scenario, drill-downs into Demantra, IO, and ASCP are not supported.
- APCC and APS are on the same instance, 12.1 or higher.
In this scenario, drill-downs into Demantra, IO, and ASCP are supported

Integration with 11.5.10

11.5.10 Out-of-Box

For the 11.5.10 customers, there is a complete, out-of-box integration to a separate, standalone 12.2 APCC instance. The key assumptions and limitations that apply in this case are:

- All dimensions are collected or loaded using legacy upload, into the APCC instance.
- The EBS source instance setups, including instance codes, are identical in 11.5.10 and 12.2 instances.
- The drill-downs into ASCP, IO, and Demantra are not supported.
- This scenario is available for Demantra, Oracle Demand Planning (ODP), ASCP and IO only.

ASCP and IO Integration

For ASCP and IO plans, there is a new plan launch parameter, Export to Advanced Planning Command Center. The available values are Yes and No. The default is No.

Note: If the Set to Display KPI Indicators plan option is set to No, the

Export to Advanced Planning Command Center parameter must also be set to No. It cannot be updated.

When the Export to Advanced Planning Command center parameter is set to yes, perform the steps below:

1. 1. Run Archive Plan Summary concurrent program with two variations.
 - a. All summarized fact data will be updated across the data base link in a 12.2 instance. A new parameter, APCC Instance Code, will be defaulted from a new profile option, MSC: APCC Instance.
 - b. Demantra unpublished data, such as historical facts or other forecast facts, will not be updated in the 12.2 instance. A new parameter, Publish All Demantra Facts, will be defaulted to No.
2. On the destination instance, launch the program to recompute the aggregates based on the above archive plan summary.

Demantra and Oracle Demand Planning

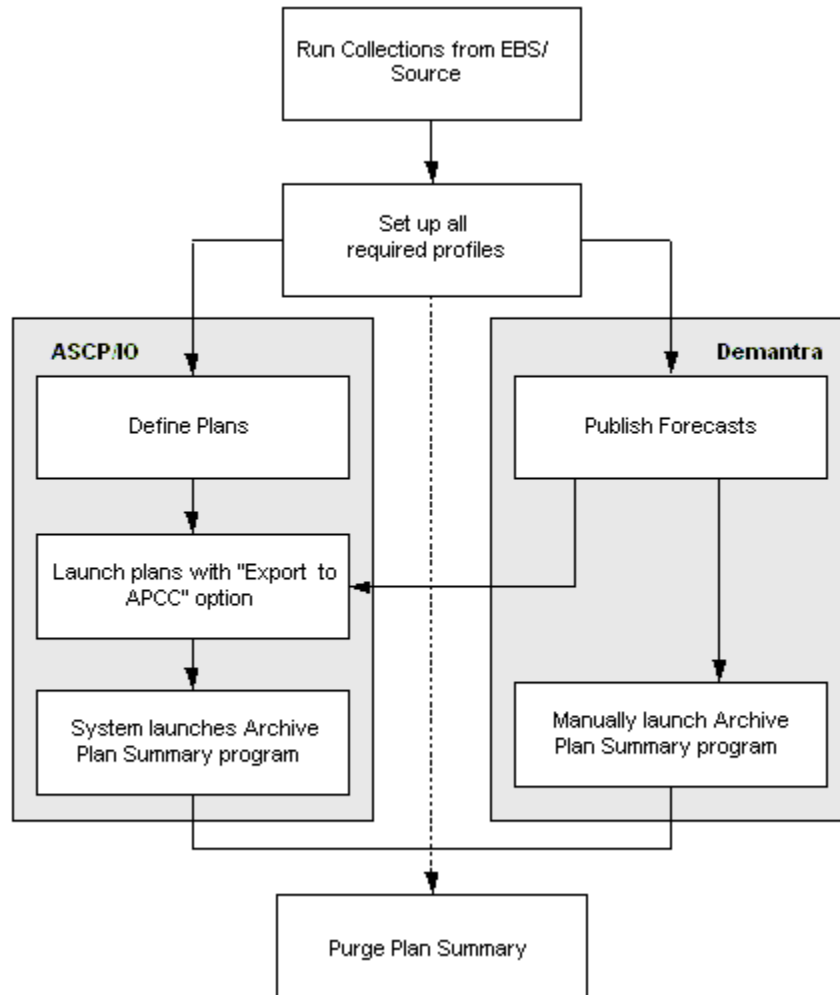
The publish workflow for Demantra is not changed. You must manually run the archive plan summary concurrent program, which will have the same new parameters as ASCP and IO by giving the Demand Scenario designator. This applies to ODP as well because the underlying data model is similar. However, in ODP, the parameter used to publish Demantra unpublished data, historical facts, and other forecast streams, must be set to No.

Integration Process

To achieve a successful integration, you must perform the processes and steps below:

1. Launch the collection from the EBS/Source system.
2. Set up all the required profiles for the APCC 12.1 integration.
 - 2a. For Demantra forecast metrics and historical facts, manually launch the Archive Plan Summary program.
 - 2b. For ASCP and IO metrics, the integration is automated by a plan launch parameter named "Export to APCC."
3. Optionally, you can clean up a specific version or all versions of a plan using the Purge Plan summary concurrent program. The Purge Plan summary program cleans up your data for that plan or version in both the 11.5.10 and the 12.1 instances.

A summary of the process is shown in the diagram below.



Note: This integration does not add any additional latency for the plan itself to be available in the APS 11.5.10 planner workbench.

On APS 11.5.10 instance, the ASCP and IO Launch Plan concurrent program has a parameter named Export to APCC. This launches the Archive Plan Summary program internally for the current plan with the following default values:

- Plan = Current plan name
- Keep Archived Versions = No
- Publish All Demantra Facts = No

When set to Yes, it triggers the Archive Plan Summary Program and creates a new archive of the plan on the APCC 12.1.

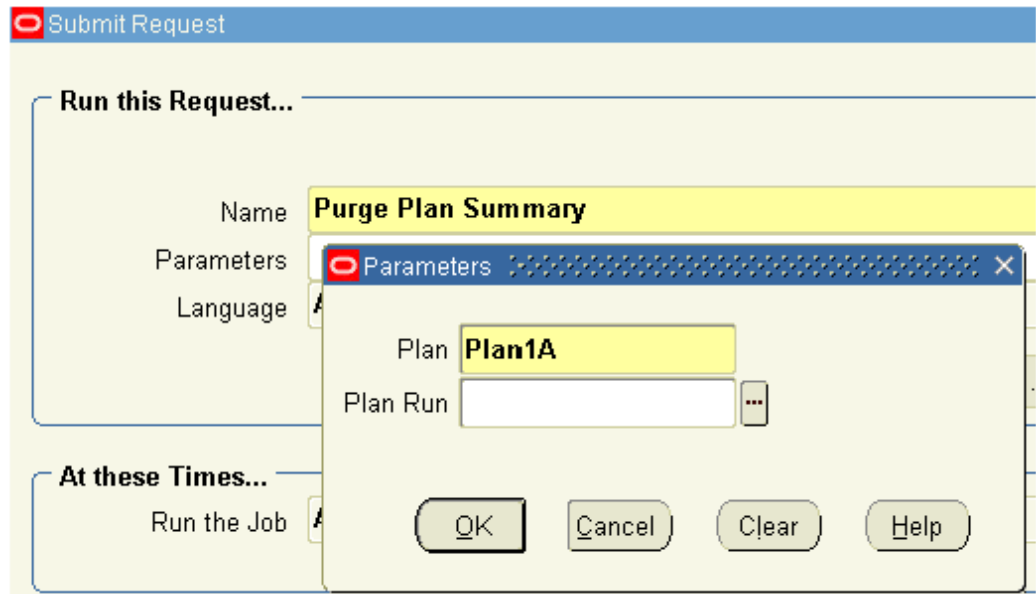
Plan Name	1-APCC-A-B	Plan in 11.5.10 to test backport
Launch Snapshot	Yes	
Launch Planner	Yes	
Anchor Date	21-APR-2009	
Export to APCC	No	
Enable 24x7 ATP		
Release Reschedules		
Snapshot Static Entities	Yes	

You can also launch the Archive Plan Summary program manually for any plan to publish the summary for analysis in APCC on the 12.1 instance. The parameters are:

- Plan: Plan name to archive.
- Keep Archived Versions: Enables users to create a new version for the plan, keeping earlier published versions. If this option is set to Yes, every plan run creates a new version on the APCC 12.1 server. This is the default behavior when launched directly from launch plan with export to APCC set to Yes.
- Publish All Demantra Facts: Enables the user to publish all historical facts and forecast metrics from Demantra. If this option is set to Yes, all the other forecast metrics, other than consensus forecast, historical facts from Demantra are published to APCC 12.1 instance together with this plan.

Integration with 11.5.10 Purge Plan Summary

From APS 11.5.10 instance you can launch the concurrent program Purge Plan Summary to purge the facts of a plan, or a specific version of a plan, from both the APS 11.5.10 and APCC 12.1 instances. There is also a Purge Plan Summary program on 12.1 instance that you can launch independently, as shown below:



To launch the 11.5.10 launch process:

1. Launch collection from the EBS/Source system.

Note: You can automate this process by making the collections in the APS 11.5.10 instance synchronize the data in APCC 12.1 instance. This is accomplished by setting the collections parameter in the APS 11.5.10 with the parameter Synchronize Collected Data in 12.1 Instance. This must be completed before the archive plan summary is launched on the 11.5.10 instance.

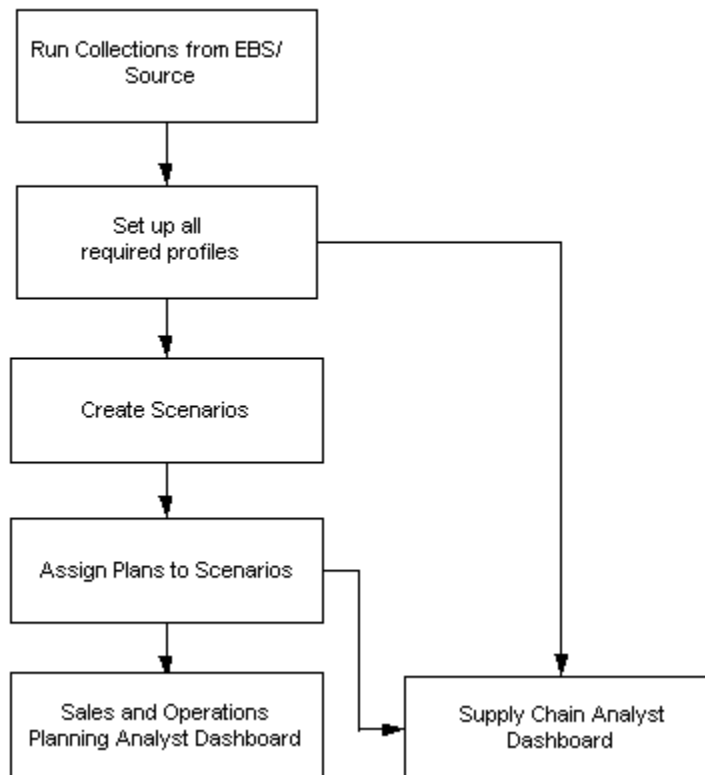
2. Set up all the required profiles for the APCC 12.1 integration.
3. Create scenarios.
4. Assign plans to these scenarios to enable comparisons in APCC reports and dashboards.
5. Optionally, you can clean up a specific version or all versions of a plan using the Purge Plan summary concurrent program. The Purge Plan summary program cleans up your data for that plan or version in both the 11.5.10 and the 12.1 instances.

Integration with 12.1

To launch 12.1 integration, follow the processes below:

1. Launch collection from the EBS/Source system.
2. Set up all the required profiles for the APCC 12.1 integration.
3. Create scenarios.
4. Assign plans to these scenarios to enable comparisons in APCC reports and dashboards.

A summary of the process is shown in the diagram below.



12.1 Data Loads To and From APCC Fact Repository

Import User Interface

A new menu entry under the Advanced Planning Scenario Manager, named Load Fact Data From External Systems, accesses the Load Fact Data page. The data you load, using .csv file format, can be from either a legacy planning application or files that are exported from another 12.2 or 11.5.10 planning application.

You also have the option to upload the data using Id's for all entities, subject to the

condition that the same source ERP instance. If you choose this option, you must:

- Apply the same instance code to the uploaded file.
- The instance codes that are available in the files are also set up in the target instance with the same name
- All necessary master data, such as organizations, items, resources, must be available in that target instance with the appropriate source instance code.

ORACLE® Advanced Planning Command Center

Diagnosis Home Logout Preferences Personalize Page

Load Fact Data

[Personalize "Load Fact Data"](#)
[Personalize Flow Layout: \(MasterTemplateRegion\)](#)
[Download Templates](#)
[Personalize Table Layout: \(MasterMasterRegion\)](#)

Plan Name: Description:

Plan Start Date: Plan End Date:

Plan Type: Instance:

Upload Mode:
☐ Append to latest version ☐ Replace latest version ☐ Create new version

Files selected for upload

Personalize "Files selected for upload"

Personalize Table: (Tableable)

Fact	File Name	Overwrite After
Supplies	<input type="text"/> <input type="button" value="Browse..."/>	<input type="checkbox"/>
Demands	<input type="text"/> <input type="button" value="Browse..."/>	<input type="checkbox"/>
Demands (Cum)	<input type="text"/> <input type="button" value="Browse..."/>	<input type="checkbox"/>
Historical Facts	<input type="text"/> <input type="button" value="Browse..."/>	<input type="checkbox"/>
Forecasting	<input type="text"/> <input type="button" value="Browse..."/>	<input type="checkbox"/>
Exceptions	<input type="text"/> <input type="button" value="Browse..."/>	<input type="checkbox"/>
Order Details (LUA)	<input type="text"/> <input type="button" value="Browse..."/>	<input type="checkbox"/>

There are three methods available for uploading your data:

- 1. Append to latest version: This option allows you to append with or without an overwrite date. You will receive an error if your plan is not named.

If you choose append to latest version with no overwrite date, the application adds the uploaded data to the latest version.

If you choose append to latest version with overwrite date, the application deletes all data for that entity after the overwrite date in the latest version and then uploads the data to the latest version. This is useful when uploading historical data, for example, shipment history.

Note: Don't forget to name your plan. In the append method of uploading your data, you will receive an error if the plan is not named.

- Replace latest version: This option deletes all data for that entity in the latest version and uploads the data to the latest version. When you use this method to

upload your data, you must create a new plan if there is not a plan with the same name.

- 3. Create new version: This option creates a new version by using the current date and the next sequence number.

In any plan, only one file can be loaded per entity. You do not need to load data for all twelve entities at the same time. When you do upload more than one file at a time, however, the upload method you have chosen applies to all files.

You can identify the plans created by the Load Fact Data page with a flag. Use this flag to ensure that:

- These plans are never displayed in any application except the APCC dashboards.
- The Append and Replace functions only work with these special plans and not regular plans.

The following list of categories is available for bulk upload directly into the APCC fact data repository. The table indicates the metrics that are grouped into each category and the fact table that the stores the data.

Category	Fact Table
Supplies	MSC_SUPPLIES_F
Demands	MSC_DEMANDS_F
Demands (Cum)	MSC_DEMANDS_CUM_F
Historical facts	MSC_DEMANTRA_ODS_F
Forecasting	MSC_DEMANTRA_F
Exceptions	MSC_EXCEPTIONS_F
Order Details (due)	MSC_ITEM_ORDERS_F
Order Details (start)	MSC_ITEM_WIPS_F
Resources	MSC_RESOURCES_F
Suppliers	MSC_SUPPLIERS_F
Inventory facts	MSC_ITEM_INVENTORY_F

In the event that there is an error during your upload, such as invalid master data reference or invalid date range, the error is logged in the concurrent request log file and the data upload process continues to the next row without stopping.

Importing the Plan Summary

A new concurrent program, Import Plan Summary, is available in 12.2 only for users of 12.1 that enables you to import the summarized fact data from other legacy planning systems or from other versions of APS. The concurrent program has the following parameters:

Parameter	Valid Values	Notes
Plan Name	All plans	Required
Plan Version	Versions of the plan	Required
Plan Type	<ul style="list-style-type: none"> Advanced Supply Chain Inventory Optimization Distribution Service Parts Strategic Network Optimization Demand Scenario Rapid Planning 	
File Location		Directory name where the exported files will be written to. The system will expect the file names to be in the standard format of TABLE_NAME.csv (like MSC_ST_ITEM_ORDERS_F.csv)
Organization		Optional. Plan Owning organization

Plan Start Date		Optional
Plan Cut off date		Optional
Supplies – Overwrite after	Date	Optional
Demands – Overwrite after	Date	Optional
Demands (cum) – Overwrite after	Date	Optional
Historical facts – Overwrite after	Date	Optional
Forecasting – Overwrite after	Date	Optional
Exceptions – Overwrite after	Date	Optional
Orders (start) – Overwrite after	Date	Optional
Orders (due) – Overwrite after	Date	Optional
Resources – Overwrite after	Date	Optional
Suppliers – Overwrite after	Date	Optional
Inventory – Overwrite after	Date	Optional
Excess – Overwrite after	Date	Optional

Export Plan Summary

A new concurrent program "Export Plan Summary" will be made available in 12.2 only for users to be able to export the summarized fact data from APCC repository. The concurrent program will have the following parameters:

Parameter	Valid Values	Default Vault	Notes
Plan Name	All plans		Required
Plan Version	Version of the plan		Required
Plan Type	<ul style="list-style-type: none">• Advanced Supply Chain Plan• Inventory Optimization• Distribution Plan• Service Parts Plan• Strategic Network Optimization• Demand Scenario• Rapid Plan		Required
Export Complete Demantra Data	Yes / No	No	Will control if all the demantra facts (historical data, unpublished forecasts) are exported Directory name where the exported files will be written to.

Other Impacts

In the 12.2 APCC instance, the imported plan summaries (either through UI or the import concurrent programs) will be flagged internally to distinguish them from other plans that are natively created in the APCC instance.

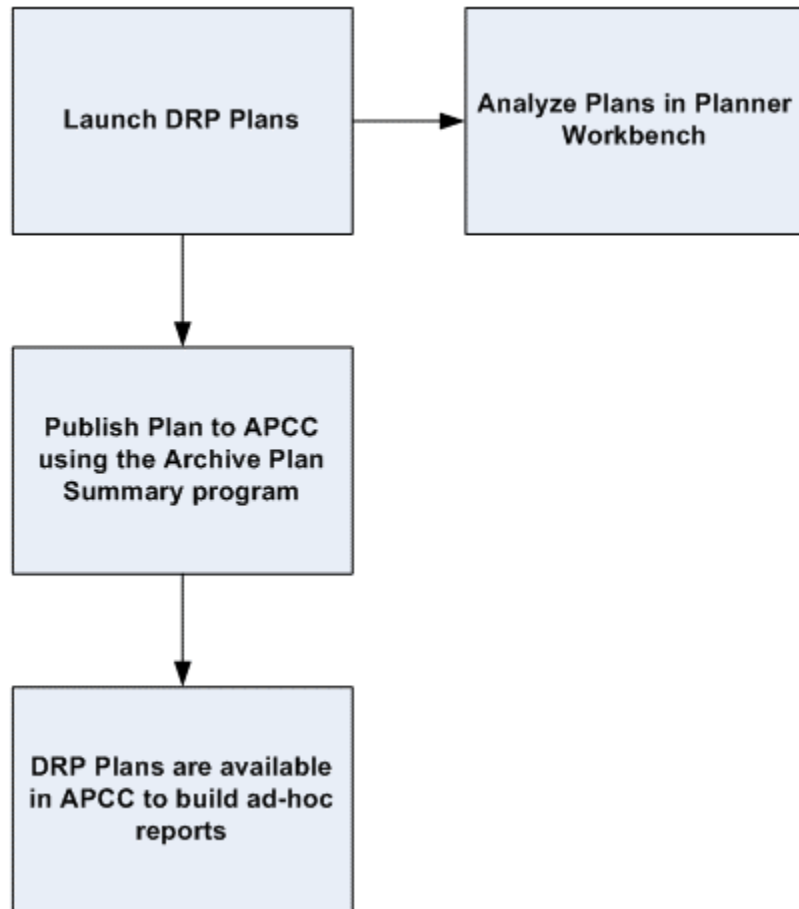
These imported plans and plan-runs will be available for creating new scenarios in APCC and in all plan list of values in all dashboard in APCC. They will not be available for attaching to any BPEL processes in APCC or in any of the individual applications or workbenches in the 12.1 instance.

APCC Integration with Oracle Distribution Planning

Value Chain Planning users who use Oracle Distribution Planning (DRP) are able to analyze their DRP plan outputs in APCC. You can publish your DRP plans to APCC and enable summarization and archival of these plans. You can also build scenarios using these DRP Plans in the Advanced Planning Scenario Manager User Interface of APCC.

Note: DRP plans are not accessible from the seeded Supply Chain Analyst Dashboard or in any of the seeded reports. However, they can be enabled in any new custom report.

The flow of information from DRP to APCC is shown in the diagram below:



Archiving a Plan Summary

To bring your DRP plan into APCC, you need to manually run the Archive Plan Summary program. This concurrent program accepts the Plan, Keep archived version parameter. Valid values are Y or N. You can launch this program for DRP plans with the same version and archiving capability as plan types ASCP, SNO, IO, and SPP.

Note: There is no plan option that enables launch of archive plan summary after every plan run. You need to manually launch this program or schedule, if appropriate.

You can use the plan option Calculate Key Performance Indicators to determine whether to trigger archival of DRP plan during its plan run. If this is set to Yes, then after the plan run, archive plan summary is launched automatically for that plan. The default is No.

When a DRP plan is launched, you have the option to keep the previous version of the plan archive or overwrite the previous version with the current version. You do this by using the new plan launch parameter Archive Current Version of Plan Summary, similar to ASCP Plans. The default is No.

Once the archive plan summary is completed, you can access the following measures for this DRP plan in Oracle Business Intelligence – Enterprise Edition (OBI-EE). For information on archiving plans and scenarios, see *Archiving Plans and Scenarios* in Chapter 4 of this document. For information on the archiving procedures, see *Archiving Scenarios* in Chapter 2 of this document.

Existing Base Measures:

- Order Quantity (includes all DRP order types)
- Exceptions count (all DRP exception types)
- Exceptions value (all DRP exception types, reporting/functional currencies)
- Inventory Turns
- Scheduled Receipts
- On hand
- Carrying Cost (reporting/functional currencies)
- Purchasing Cost (reporting/functional currencies)
- Total Supply Chain Cost (reporting/functional currencies)
- Revenues (reporting/functional currencies)
- Gross Margin (reporting/functional currencies)
- Gross Margin %

New Base Measures:

- Maximum Inventory Level (Units) – [valid Dim – Item/Org]
- Maximum Inventory Level (Days of Supply) [valid Dim – Item/Org]
- Target Inventory Level (Units) [valid Dim – Item/Org]
- Target Inventory Level (Days of Supply) [valid Dim – Item/Org]

Calculated Measures:

- Total Supply
- Total Demand
- Projected Available Balance (units, value in reporting/functional currencies and days of supply)

- Fill Rate

Purging a Plan Summary

The Purge Plan Summary program, which lets you purge unused plans and their archives, is enabled for DRP. There are no changes to the standard dimension or hierarchies. The following lists the dimensions that are relevant for the measures supported for DRP plan:

- Plan
- Item
- Organization
- Time
- Customer
- Supplier
- Demand Class
- Order Type
- Exception Type

The mapping of the measures to the dimensions they support remains unchanged. For information on the purging plans and scenarios, see *Purging Scenarios* in Chapter 2 of this document. For information on measures and the dimensions they support, see Chapter 4 of this document, *Understanding the Advanced Planning Analytical Framework*.

Distribution Planning Profiles

DRP plans support the current APCC profile settings of the following profiles:

- MSC: APCC Calendar Code
- MSC: APCC Period Set Name
- MSC: APCC Currency Code
- MSC: APCC Category Set 1
- MSC: APCC Category Set 2
- MSC: APCC Category Set 3

These settings control the time dimensions, item dimensions and the measures. For more information about APCC profiles, see Chapter 4 of this document, *Understanding*

the Advanced Planning Analytical Framework.

Exporting and Importing a Plan Summary

You can deploy APCC in a standalone mode where you can integrate third party planning systems into it. In this mode you can use APCC as a central tool for understanding global supply chain planning deployments that include other legacy products. To enable this, you can import/export facts directly into APCC repository

DRP plans are enabled in the two concurrent programs 'Export Plan Summary' and 'Import Plan Summary' so that you can download the measures listed above and upload all measures to APCC.

For more information about APCC standalone, refer to sections earlier in this appendix.

Operation Data Store

Real-Time Planning in APCC

As part of the next generation planning platform, APCC has a more real-time, event-based planning and execution system. This platform provides planners with more real-time visibility into real world changes that are occurring both within and outside the enterprise. With this knowledge, you can react and, if necessary, correct your plan before making any planning decisions.

The platform provides the ability to:

- Capture key real-time events in the supply chain – both internal and external.
- Define a set of business rules to filter, validate, and process each event.
- React in real-time to the events, such as exceptions, alerts, and user actions.
- Analyze these exceptions across plans or runs – to see trends, do an age-analysis, and so on.

A set of pre-seeded business events triggers workflows or processes that are validated against a set of user-defined rules. The rules include conditions that qualify the event as one that the planner is interested in viewing in real-time. There is a trade-off between having too many of those events, which could potentially increase the nervousness in the plan, versus too few events, which could lead the planner into making decisions on stale data.

Real-Time Planning Use Case

An example of a typical use case of real-time planning within an enterprise is outlined below:

- Starts off with a supply chain plan P1 based on a consensus forecast from Demantra.

- A key component supplier likely to delay a major delivery (change in promise date).
- The new due date on the Purchase Order is immediately reflected in APCC repository.
- Alert generated in APCC based on a custom iBot that compares plan with real-time data.
- User looks at iBot, talks to supplier, makes a note in APCC with plan, item, period context.
- The iBot also generates a real-time exception which is then visible in APCC.
- Optionally, the iBot can trigger a re-plan (in Rapid Planning) to analyze the full impact of the delay in the Purchase Order. The user can simulate an offload to alternate in a new version of the plan (P2) in Rapid Planning.
- A comparison of the two versions of the plan (P1 & P2) is done in Rapid Planning (or Advanced Planning Command Center).
- Plan P2 found better overall on metrics of fill rate versus gross margin. Resolution implemented.

Process Flow

All real-time updates and events are recognized when the source system, such as ERP, or Legacy, updates APS Operational Data Store (ODS) either through a batch collection program or a synchronous web service call.

The updates can be any of the following types:

- Changes to due dates of open orders
- New orders, cancellations, changes to qty
- Updates to performance history on bookings, shipments, production and inventory

Collected Data in APCC

The following measures, which currently exist for a plan, are enabled for collected data in APCC:

- Total Supply
- Total Demand
- Schedule Receipts

- On-hand
- Order Quantity
- Resource Availability
- Resource Requirements
- Net Resource Availability
- Cum Net Resource Availability
- Resource utilization %
- WIP start quantity

The concurrent program, Refresh Collected Data in APCC Repository, refreshes the APCC repository. The parameters for the concurrent program are:

- Instance (required).
- Complete. Valid values are Yes or No.

Yes: a full refresh of the repository is carried out.

No: an incremental refresh of the collected data is carried out.

The date range of the collected data that is available in APCC depends on the following two profile options:

- MSC: Horizon for APCC Collected data - Forward days
- MSC: Horizon for APCC Collected data - Backward days

Incremental Updates to Real-Time Data

In case of an incremental refresh, the logic is:

1. Identify the items or resources that have changed.
2. Rebuild the APCC repository for those items only, for all measures.
3. Rebuild all pre-aggregated data that are impacted by these items.

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