Oracle SCM Cloud

Using Sales and Operations Planning

19D
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Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Help

Use help icons to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access the Oracle Help Center to find guides and videos.

Watch: This video tutorial shows you how to find and use help.

You can also read about it instead.

Additional Resources

- Community: Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.

- Training: Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>boldface</td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td>monospace</td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
</tbody>
</table>
Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website. Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.

Contacting Oracle

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 Sales and Operations Planning Overview

Overview of Sales and Operations Planning

Sales and Operations Planning aligns organizations around an integrated operating plan to meet strategic business goals. You can align the enterprise, analyze plan performance, and act to create and execute new plans.

By aligning the enterprise, you can:

- Harness collective knowledge by using the enterprise social collaboration.
- Collaborate on plans or planning cycles.
- Ensure continuity and provide accountability by using planning notes.
- Arrive at a consensus enterprise operating plan.

By analyzing the plan to make better decisions, you can:

- Analyze plan performance with preconfigured dashboards, layouts, and reports.
- Configure analytics to meet your unique needs.
- Manage by exception to focus on what is most important.
- Integrate with Microsoft Excel.
- Demonstrate how plans have changed by using plan archives and waterfall charts.

By creating plans to act, you can:

- Plan at an aggregate level for strategic time horizons.
- Run quick simulations within Sales and Operations Planning to evaluate new plans.
- Select the best plan after comparing with other plans.
- Link tactical planning with Sales and Operations Planning and execute on strategic decisions.

In summary, Sales and Operations Planning enables you to implement a continuous and forward-looking process. The Sales and Operations Planning process profitably aligns product, demand, and supply plans at an aggregate level with your strategic and financial objectives.

Business Flows for Sales and Operations Planning

Use Oracle Fusion Sales and Operations Planning, a modern planning cloud solution, to manage your sales and operations planning process.

You can perform the following in the Sales and Operations Planning work area:

- Process data collection and load planning data from external sources
- Create and manage plans
• Automate a portion of the planning processes or run a subset of the processes
• Analyze and adjust your data at any stage

The following figure illustrates the Sales and Operations Planning business flow steps.

Data Collection

Data collection is the first step of the planning business flow. You can collect and transform the data from various Oracle Supply Chain Management Cloud applications to the Supply Chain Planning repository. The data that you collect can be of three types:

• Master data: Primarily sourced from Oracle Supply Chain Management Cloud.
• Demand data: Two potential sources of demand data are:
  o Sales order data that flow from the Oracle Order Management Cloud.
  o Shipment history from the Oracle Materials Management Cloud.
• Supply data: Supply data is collected from three sources:
  o Oracle Inventory Management Cloud
  o Oracle Manufacturing Cloud
  o Oracle Purchasing Cloud

Load Planning Data from Files

Apart from collecting data from an Oracle Fusion source system, you can also collect data from an external source system. Use the predefined collection templates (XLSM files) to collect data from an external source system. You must use the collection template to collect Bill of Resources and planning measures data from external sources.

Manage Plans

In the Manage Plan stage, you create and manage sales and operations plans. You can create a plan and then define the plan based on your business requirement.
The Manage Plans page is for integrated plan management. The following are some of the tasks that you can perform from the Manage Plans page:

- Create and define plans
- Create a copy of existing plans
- Open an existing plan
- Run plans in batch mode
- Perform data refresh on your plans
- Approve plans

Load Measures from Other Plans

Loading measures from other plans is an optional step. If you have a valid supply plan, demand plan, or demand and supply plan, you can load measures from these plans to a sales and operations plan. The plans can be from the Demand Management, Supply Planning, Demand and Supply Planning, or Planning Central work area. For example, if the shipment forecast is managed in Demand Management or Planning Central, you can use the Load Measures from Other Plans task to load the shipment forecast in Sales and Operations Planning.

Process Review Stages

During the process review stages, you work with stakeholders to manage the product life cycle, balance demand and supply, and review the financial feasibility to execute the plan. The process review includes the following stages:

- Product Review
- Demand Review
- Supply Review
- Financial Review
- Executive Review

Note: For more information on each of the process review stages, see the Manage Planning Cycles chapter in the Oracle SCM Cloud Using Sales and Operations Planning guide.

Approval and Execution

In the approval and execution stage, you decide upon the best plan among alternative simulation plans using plan comparison. After you get an approval for the consensus operating plan from all stakeholders, you execute the plan in your tactical planning process.

Related Topics

- Overview of Planning Cycles in Sales and Operations Planning
- Overview of Sales and Operations Plans
- How You Collect Different Data Types for Supply Chain Planning
- How You Load Planning Data from Files
Overview of Supply Chain Planning Work Areas

The Oracle Supply Chain Planning Cloud solution is comprised of products designed for specific supply chain planning business processes and tasks. You perform these processes and tasks using work areas. Each of the Supply Chain Planning products provides access to one or more work areas.

The Supply Chain Planning work areas that you can use are determined by these factors:

- The products that your enterprise has licensed and configured
- The security privileges assigned to your user account

To use the Supply Chain Planning work areas, you must be aware of the following points:

- Navigation to work areas
- List of Supply Chain Planning work areas and the products to which they are applicable

Navigation to Work Areas

You can use different paths to navigate to a specific work area including:

- From the Navigator: You click the Navigator icon to see the work areas you have access to. The Supply Chain Planning work areas are listed within the Supply Chain Planning heading. The work area names are links. You click a specific work area link to access that work area.
- From the Springboard: On your home page you may have one or more springboard icons that represent a group of work areas, such as the group of Supply Chain Planning work areas. Click on the Supply Chain Planning springboard to access a set of icons, each of which represents a specific Supply Chain Planning work area. You click a specific icon to access that work area.

List of Supply Chain Planning Work Areas

The following table lists the Supply Chain Planning work areas and the Supply Chain Planning products that are applicable to each of the work areas.

<table>
<thead>
<tr>
<th>Work Area</th>
<th>Products</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order Promising</td>
<td>Oracle Fusion Global Order Promising</td>
</tr>
<tr>
<td>Demand Management</td>
<td>Oracle Fusion Demand Management</td>
</tr>
<tr>
<td>Supply Planning</td>
<td>Oracle Fusion Supply Planning</td>
</tr>
<tr>
<td>Demand and Supply Planning</td>
<td>Both of these products must be configured:</td>
</tr>
<tr>
<td></td>
<td>• Oracle Fusion Demand Management</td>
</tr>
<tr>
<td></td>
<td>• Oracle Fusion Supply Planning</td>
</tr>
</tbody>
</table>
You can use the Plan Inputs work area to perform tasks that do not require creating or accessing a plan.

This work area is applicable to these products, in addition to the product-specific work areas:

- Oracle Fusion Demand Management
- Oracle Fusion Supply Planning
- Oracle Fusion Planning Central
- Oracle Fusion Sales and Operations Planning
- Oracle Fusion Global Order Promising

**Related Topics**

- Overview of the Supply Planning Work Area
- Overview of the Planning Central Work Area
- Overview of the Demand Management Work Area
- Overview of the Order Promising Work Area

**Overview of the Sales and Operations Planning Work Area**

Use the Sales and Operations Planning work area to configure, view, and analyze your real world business processes.

You can use the Sales and Operations Planning work area to do the following:

- View multiple plans and plan inputs simultaneously.
- Use predefined page layouts or create page layouts to view plan data tailored for your organization.

To access the Sales and Operations Planning work area and open a plan:

1. In the Navigator, click the **Sales and Operations Planning** link.
2. In the Sales and Operations work area, click **Manage Plans** from the **Tasks** drawer.
3. On the Manage Plans page, use the search feature to locate an existing plan.
4. Select the plan and click **Actions**.
5. Select Open to open the Edit Plan page for your plan. Your plan name appears in the Edit Plan page header.

The Edit Plan page consists of two main areas:

- Header
- Configurable pane
Header
The header area contains the page layout information and actionable buttons, such as Save Layout, Change, Open, Actions, Save, and Cancel. The header area displays the plans, simulation sets, and plan inputs that are currently opened.

You can create your own page layout or use the predefined layout. The Executive Review Summary tile set is the default layout for Sales and Operations Planning when you open or edit a plan. You can also save a layout so that every time you open the Edit Plan page, the saved layout opens.

Configurable Pane
You can display the content of your plan in the configurable pane area, which is located below the header area. You can add multiple panes on the page to display your content. The Page Layout drop-down list in the header area determines the number of panes in your planning interface page.

Manage Page Layouts
You can create and manage your page layouts. Use the Manage Page Layout action to modify the properties of your existing page layouts. You access a plan interface page by opening a plan from the Manage Plans page in the Sales and Operations Planning work area.

This topic discusses the following:
- Creating a page layout
- Editing a page layout
- Managing a page layout
- Using a page layout

Creating a Page Layout
Page layouts are reusable across plans, simulation sets, and plan inputs. You can create page layouts or copy and then edit a page layout to create page layouts that are tailored to specific business needs.

To create a page layout:

1. In the Navigator, click the Sales and Operations Planning work area.
2. Click the Plans panel tab.
3. In the Plans panel drawer, expand Plans list.
   - Open a plan for which you want to create a page layout.
4. From the Page Layout drop-down list, click Create.
5. Specify the following details and click Save and Close:
   - Enter a page layout name and description.
   - Select the access level as Public or Private.
     - Select Public to make the plan accessible for all users.
     - Select Private to restrict the plan accessible to you and to a list of users that you want to provide access.
This creates an empty pane page layout.

6. Click the **Change** drop-down list and select any layout.
   For example, select a two pane horizontal layout.

7. Click **Open** and select the pane and add the content using the **Open Table, Graph, or Tile Set** dialog.

8. Click **Save** Layout.

**Editing a Page Layout**

You can edit an existing page layout in two ways:

- Use the **Save** button to save the current page layout as it is currently displayed. For example, you can change the current page layout from a one pane layout to two pane layout. The next time you use this page, the layout appears as a two pane layout.
- You can also change a page layout using the **Manage** action from the page layout drop-down list.
- You cannot edit the predefined page layouts. You can copy and then edit the copy.

**Managing a Page Layout**

You can use Manage Page Layout to perform the following:

- Edit the page layouts that you created. You can move one pane to other using Manage page layouts. However, if you are using a public page layout, where you are not the owner, then you cannot make changes to the layout. You can only set the layout to your default layout.
- Change the layout that is used as your default layout when you initially open a plan, simulation set, or plan inputs.
- Delete layouts that you created, but are no longer needed.

**Using a Page Layout**

The default page layout in Sales and Operations Planning is the Executive Review Summary. It contains a set of infotiles and high-level graphics that you can use to review the business value of a plan. Using infotiles, you can view the key metrics of your plan. You can further drill to the predefined analytics from the tables or graphs displayed in this layout.

The Executive Review Summary page layout is the Executive Review Summary tile set report presented in a single pane layout. There are other predefined tile set reports, which are also known as plan summary dashboards. Sales and Operations Planning has a summary dashboard for each of the five standard stages of the sales and operations planning process:

- Product Review Summary
- Demand Review Summary
- Supply Review Summary
- Financial Review Summary
- Executive Review Summary

Using a summary dashboard, you can do the following:

- Measure the performance of a plan.
- Review plan information through the individual Key Performance Indicators (KPIs).
- Perform plan analysis using the contextual based navigation.
• Copy and configure the components of a plan summary layout for your specific need.

You can use a page layout in an open plan by using the Page Layout drop down list.

**Related Topics**

• Overview of Planning Cycles in Sales and Operations Planning

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### How You Define Planners for Supply Chain Planning

Planners are the people in your organization who are responsible for a set of items, their inventory levels, supply and demand, and so forth. For example, some typical titles of planners are Material Planner, Supply Chain Planner, and Demand Planner. All supply chain planning products use planners. You can define a specific person as a supply chain planner for the Oracle Fusion source system or for any other source system. You can also associate a planner to an item at the organization level.

Use the ScpPlannersImportTemplate.xlsx import template to create the CSV file for the **Load Planning Data from Files** task for planners. You can also use the Manage Planners page to define supply chain planners for each source system. Access the Manage Planners page from a Supply Chain Planning work area. Click the **Tasks** panel drawer and then click the **Manage Planners** link.

For Oracle Fusion source systems, associate the employee identification number with the planner name because Oracle Fusion Purchasing requires a valid employee identification number. When a planner releases a planned order, purchasing checks the employee identification number before creating the purchase requisition.

For external source systems, determine if the employee identification number is required when releasing planned orders. If required, use the Manage Planners page to associate the planner with their employee identification number. Or, you can use the ScpPlannersImportTemplate.xlsx template to associate the employee identification number with the planner name.

Use Oracle Fusion Product Hub to assign planners at the item-organization level. During data collections, the planning processes collect the planner-item-organization assignment. Planners can then use the planner name to search the data on most of the demand and supply planning pages.

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### Overview of Supply Chain Planning Plan Types

When you create a plan, plan type is the first choice that you make. After you run a plan, you can’t edit the plan type. Supply Chain Planning provides these types of plans, which you can create, edit, run, and so on, depending on the work area that you have access to:

<table>
<thead>
<tr>
<th>Plan Type</th>
<th>Use This Plan Type</th>
<th>Work Areas the Plan Type is Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demand Plan</td>
<td>When you want to perform collaborative and statistical demand forecasting.</td>
<td>Demand and Supply Planning</td>
</tr>
<tr>
<td></td>
<td>The demand plan type can also be used as a demand schedule for a supply plan.</td>
<td>Demand Management</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Planning Central</td>
</tr>
<tr>
<td>Plan Type</td>
<td>Use This Plan Type</td>
<td>Work Areas the Plan Type is Available</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-------------------------------------</td>
<td>------------------------------------------------------</td>
</tr>
<tr>
<td>Supply Plan</td>
<td>When you want to generate a supply</td>
<td>Demand and Supply Planning</td>
</tr>
<tr>
<td></td>
<td>schedule.</td>
<td>Planning Central</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Supply Planning</td>
</tr>
<tr>
<td>Demand and Supply Plan</td>
<td>For an integrated demand and supply</td>
<td>Demand and Supply Planning</td>
</tr>
<tr>
<td></td>
<td>planning.</td>
<td></td>
</tr>
<tr>
<td>Sales and Operations Plan</td>
<td>For aggregate planning.</td>
<td>Sales and Operations Planning</td>
</tr>
</tbody>
</table>

**Related Topics**

- Actions to Manage Your Plans

**Manage Notes**

Use Notes in Supply Chain Planning to document and communicate important information about your plan. You can use notes to provide reasons for any changes made to a plan or to record decisions and assumptions that led to those changes. You can save these notes for future reference or to provide details to other users. Participants in the plan management process can annotate the data with notes to document changes and assumptions.

Notes functionality is available in the Demand Management, Supply Planning, Planning Central, and Sales and Operations work areas. You can create notes for the following:

- Plans
- Planning level members, such as items, organization, and customers
- Planning combinations, such as a specific item-organization-date-measure combination
- Exceptions

When you create a note, you must specify a note type. Note types enable notes to be categorized, which you can use as a search criteria. The following lists the predefined note types:

- General
- Assumption
- Decision
- Issue
- Possibility
- Risk
- Reference
- Special

You also specify whether the note is private or public. Private notes are visible only to the user who created the note. Public notes are visible to all the users with whom the object is associated.
From the Demand Management or the Sales and Operations work area, you can access the Notes table to display planning level members for Product hierarchies. You can create a layout to view the Notes table as part of the layout instead of as a dialog box. The Notes table is not available for Supply Planning or Planning Central.

**Notes for Plans**

You can create notes for plans. When you copy a plan, any notes associated with the plan are copied into the new plan.

To create a note for a plan, do the following:

1. Open the Plan Options page for your plan and click the **Manage Notes** icon.
2. In the Manage Notes dialog box, click **Actions > Add**.
3. In the Add Notes dialog box, add your notes.
4. Click **OK**.
5. Click **Save and Close**.

**Notes for Planning Level Members**

You can associate notes with planning-level members, such as items, organizations, and customers. You can create notes at any level of the hierarchy, such as on an individual item, on a brand, or on a product category.

Notes that you create on planning level members at lower levels in the hierarchy are visible when you open Manage Notes from an aggregate level. Notes that you create on level members are not plan-specific. This means that a note associated with a level member is visible from any plan that contains that member.

To create a note on a level member, click **Create Note** from the **Actions** menu.

To view, edit, or delete an existing note, select the level member, click **Manage Notes** from the **Actions** menu.

**Notes for Planning Combinations**

You can associate notes for the planning combinations, such as item, organization, date, and measure combination. Planning combinations appear as cells within a table.

You can create a note at any level; however, they are only visible at the level at which they are created. For example, if you create a note at a brand, month, and measure combination, you cannot view that note at the item, day, and measure level.

If you copy a plan, then any plan-specific notes on planning combinations are also copied.

To create a note for the planning combinations, do the following:

1. Select the associated table's cell in the table.
2. Click **Create Note** from the Actions menu.
3. Add your notes.
4. Click **Save and Close**.

To view, edit or delete an existing note on a planning combination, do the following:

1. Select the **Note** icon from the table's cell level.
2. Click **Manage Notes** from the Actions menu.

**Note:** If you create a note on a planning combination and the associated measure is shared across plans, then the note is not plan-specific. In this case, the note is visible across all plans. If you create a note on a planning combination and the associated measure is not shared across plans, then the note is plan-specific. In this case, the note is visible within the plan in which you created it.
Notes for Exceptions

You can associate notes for exceptions. Notes on exceptions persist across plan runs. If an exception still exists after a plan is run again, then any notes associated with the exception are retained. When an exception is resolved, the exception is removed from the application. In that case, any notes associated with the exception are also removed.

To create notes for an exception, do the following:

1. Click the Note icon on the table row of the exception.
2. Add your notes.
3. Click Save and Close.

Related Topics

• Overview of Oracle Social Network
2 Tables, Graphs, Analysis Sets, Infotiles, and Tile Sets

How You Manage Tables, Graphs, Analysis Sets, Infotiles, and Tile Sets

You can configure the entities for tables, graphs, analysis sets, infotiles, or tile sets by using a selector tool. You can also create and manage groups on the Selector Tool page, and associate your tables and graphs with the group. To access the Selector Tool from your plan, click Actions and select Manage Tables, Graphs, and Analysis Sets. You can also navigate to the Selector Tool from the Actions menu on the table and graph toolbar.

Note: In the Selector Tool, the member values displayed are based on what's configured in the Member Identifier to Display column on the Configure Planning Analytics page, Levels and Attributes tab. For example, for item, you can configure your tables and graphs to show item description instead of item name, which is what also appears when you're in the Selector Tool.

The selector tool has the following tabs:

- Measures
- Hierarchies
- Members
- Layout
- Comparison Options

Following are the details of each tab:

- Measures: Use the Measures tab to select measures for a table or graph by moving measures from the Available Measures pane to the Selected Measures pane. The measures that you select determine the content of the other tabs. The dimensions of the measures determine the dimensions available on the Hierarchies tab and the dimension members on the Members tab. For example, if a measure is the dimension created for Product, Organization, and Time, those dimensions and their hierarchies are visible on the other tabs. You can display the available measures by Measure Group or alphabetically by using the List View or Tree View icon. A measure is usually a named time series of values that represent the following at a particular intersection of customer, organization, product, supplier, and resource dimensions:
  - Historical performance (Bookings History). This measure isn’t applicable for supply planning.
  - Future projections (Shipments Forecast)
  - A key performance indicator (Gross Margin Percentage) or a derived calculation (Projected Available Balance)

The planning process aggregates measure data from lower levels to higher levels or compute KPIs and derived calculations from other values at the same level as needed. The planning process can also allocate or spread updates made at an aggregate level to the affected cells at lower levels. Measures can be expressed in different units of measure, such as inches, dollars, kilos, or liters. Depending on the context, you can display, update, or compare measures that are in different units. The planning process can convert among different units and among different currencies (for monetary values).
• Hierarchies: Use the Hierarchies tab to select the dimensions, hierarchies, and levels to include or exclude in the table or graph. For each dimension, select the hierarchies and levels that you want to include in the graph or table. Checking the box in the Display column includes that dimension in the table or graph. Expand the dimension to view the available hierarchies. Expand the hierarchy to view the levels of the hierarchy. Checking a level includes it in the table or graph. If multiple levels are checked, the top level is displayed in the table or graph by default. Each level in the table or graph can be expanded until all checked levels are visible. The Show Unassociated check box determines whether the measure values that aren’t associated with a specific dimension in the table or graph are hidden or displayed. For example, a table could include Shipments Forecast and Net Resource Availability. Shipments Forecast has product, organization, and time as dimensions. Net Resource Availability has resource, organization, and time as dimensions. With Show Unassociated, checked, the Resource column displays the word Unassociated when viewing Shipments Forecast rows.

• Members: You use the Members tab to manually select dimension members by moving members from the Available pane to the Selected pane. If no selections are made on this tab for a dimension, the graph or table displays the dimension starting at the top level checked on the Hierarchies tab. For example, if you selected the Gregorian Calendar hierarchy with Quarter and Month on the Hierarchies tab, the graph or table displays all quarters; each quarter has an icon to drill to its months.

• Layout: You use the Layout tab to format the table or graph.

• Comparison Options: The Comparison Options tab is applicable only for tables and graphs. On the Comparison Options tab, you can compare your current plan with an archived version or an alternate plan. Use this tab to compare how specific measures have varied over time. The Comparison Options tab contains three sections: Waterfall Analysis, Trend Analysis, and Plan Comparison.

> **Note:** The Comparison Options tab isn’t available for Oracle Planning Central Cloud.

- In the Waterfall Analysis section, you can compare selected measures in a table or a graph with an archived plan.

  Select the Use MAPE calculations check box if you have scheduled your plan archival process. MAPE calculations use the system administrator archive and not an on-demand archive.

  In the Measure Archives to Use drop-down list, select one or more archives to reference. The number of weeks refers to how long the archive was created. The planning process uses the following logic for when to use an archive:

  - Match the exact dates. If multiple versions of an archive are within the waterfall time frame, use the closest, most current version.
  - If not match is found on the exact date, use the closest inside the range, which is +3/-3 days of a selected weekly waterfall time frame, or +15/-15 days for a monthly archive.
  - If no match is found within the +3/-3 days of a selected weekly waterfall time frame, or +15/-15 days for a monthly archive, then nothing is returned.

  For example, if you select 4 weeks ago, the planning process searches for the archive 4 weeks prior to today's date, for instance, March 6. If your archives are stored at the month level and nothing is found on February 5, the planning process searches for the most recent archive within +15/-15 days.

- In the Trend Analysis section, you can provide the number of archives that you want to reference. The planning process selects the latest archives. For example, you have five archives, where number five is the latest archive and you have specified the Number of Previous Versions to Include as 3. The planning process will select archive number five, four, and three for the comparison. The difference between Waterfall Analysis and Trend Analysis is that in Waterfall Analysis you can choose an archive created within each selected time frame that you want to compare. In Trend Analysis, you can select the number of archives that you want to compare, and only the latest archives are used for comparison.
The Plan Comparison section pertains to both archived plans and alternate plans that you consider for comparison. You can select the type of difference to display in tables or graphs for comparison. For example, you can choose to view the difference in percentage or absolute percentage.

Using Advanced Options in the Selector Tool

You can use the Advanced Filter criteria tools to filter data and select specific members that fulfill some criteria. Click the funnel icon in the Members tab to Access the Advanced Filter options. You can use the following filter criteria tools for predefined measures:

- **Levels**: Select by level. Select the members in a level such as Customer Site for the Customer dimension, or Period for the Time dimension.
- **Family**: Select parent or child of a dimension member. Select members based on a parent or child relationship, such as selecting the Days in a Week.
- **Attributes**: Select based on name. For example, select members based on items whose name contains Economy.
- **Measure Criteria**: Select based on meeting measure criteria. Select members that meet the criteria, such as Products for which the Gross Margin is greater than a particular value.
- **Time Range**: Select a range of dates. Select time periods based on a range, start date, or today's date.

The advanced filter criteria tools are used in conjunction with action keywords to refine selections. The following four actions determine how to apply the criteria:

- **Replace with**: Replace the current selection, if any, with members meeting criteria.
- **Add**: Add members meeting the criteria to the current selection.
- **Keep**: Keep only the members in the current selection that meet the criteria.
- **Remove**: Remove the members from the current selection that meet the criteria.

You can apply filter criteria tools sequentially to refine your selection. For example, select all the items for a category, and then keep the top 10 items based on sales.

Click the **Show Results** button to see the filtered list of members based on the criteria. Removed members are shown below the filtered list. You have the option of accepting the results or resetting to the previous members.

When you accept the results, the criteria used to retrieve the accepted members appear in the **Criteria Steps** area of the tab. These criteria are evaluated when the table or graph is displayed. You can remove criteria steps.

- To remove a step, click the X button in a row.
- To view the result of removing a criteria, click **Show Criteria Change**.
- To accept the Show Criteria Change results, click **Accept** and then **OK**.
- To make the change permanent, click **Save** or **Save and Close**.
- To view the results without making the change permanent, click **Apply** and **Close**.

Creating Analysis Sets

An Analysis Set is a named set of criteria that can contain selected measures, dimension members, or both measures and dimension members. Use the Apply Analysis Set and Save as Analysis Set actions to apply previously made selections, or save the selections made in the Selector Tool.

Applying an existing Analysis Set to a table or graph is a quick way to select the measures and dimensions members that are frequently used.
You have the option of saving measures and dimension members. You can save the dimension members as a list, or as a script. For example, you can select the top 10 items based on sales for a January. If saved as a list, the same 10 items would always be displayed in the table or graph regardless of the current month. However, as sales data changes over time, you would want the top items in the current month to be displayed. To accomplish this, save the dimension members in a script that would evaluate the criteria whenever the table or graph is displayed.

**Using the Table Drilling**

After a table is created, you use drilling in the table to expand and collapse the levels within the hierarchy by which you can view different levels of aggregation. When viewing a table or graph, the dimensions and hierarchies selected in the Hierarchies tab are visible. The top selected level is visible; use drilling to view lower levels.

To drill across hierarchies or dimensions, the levels must be adjacent. Drilling is automatically available for the levels within the predefined hierarchies, but you can also configure drill pairs to drill across hierarchies or dimensions.

To display a table showing Final Shipments History with the ability to drill from customer to item, the columns customer and item must be adjacent:

1. In the Layout tab, use the View menu to select **Configure Drill Settings**.
2. Configure Drill Settings to view the existing drill pairs.
3. Click the + icon to add a new drill pair.
4. In the Drill From column select Customer and in the Drill To column select Item.

With this configuration, you can view the Shipments History values by item for each customer in the table.

**Note:** Drilling is only active between the adjacent levels on the table.

**Using the Table Linking**

You can link a table or graph to another table or graph passing the context of one to another by selecting **Manage Links** from the Actions menu on the toolbar.

There are two tabs:

- To Table or Graph: Use this tab to create a link to another table or graph.
- From Table or Graph: Use this tab to link to the open table or graph from another table or graph.

Use the + icon to select the table or graph to link to or link from.

- Enable Dynamic Linking: This check box determines whether or not Dynamic Linking is enabled. If it's enabled, then the target table or graph has the ability to be refreshed whenever the selections on the source table change.
- Pass Highlighted Selections and Selected Members: If this button is selected, then whatever is highlighted in the current table along with the filters in the Selector can be passed as context to the Drill To Table or Graph.

After you define the link, use the Drill icon on the toolbar to drill to the linked table or graph.

**Related Topics**

- How You Use Levels and Attributes in Supply Chain Planning
Create a Tile set

You can create a tile set to group individual infotiles. Creating tile sets can be useful in cases where you want to track various metrics on a single page. You can add tile sets to a pane in a page layout.

Tip: Before you create a tile set, check whether you need to create the infotiles that you will be adding to the tile set.

To create a tile set:

1. In the Navigator, click a Supply Chain Planning work area.
2. Click Actions > Manage Table, Graphs, and Analysis Sets.
3. On the Search table toolbar, from the Actions menu, select Create > Tile Set.
4. In the Selector Tool - Create Tile Set dialog box, specify the following details:
   - Enter name and description for the tile set.
   - Select a group for the tile set.
5. From the Available Tiles pane, select the infotiles to include in the tile set and move them to the Selected Tiles pane.
6. Click Save and Close.

Create an Infotile

An infotile is a tile shaped component used to present a graphical summary of the data. Each infotile has one or more related tables or graphs with predefined drill-to actions to display additional information about that key performance indicator (KPI).

To create an infotile:

1. In the Navigator, click a Supply Chain Planning work area.
2. Open a plan and then click Actions > Manage Tables, Graphs, and Analysis Sets.
3. In the Manage Tables, Graphs, and Analysis Sets dialog box, in the Search Results region, click Actions and then select Create > Tile.
4. In the Selector Tool - Create Tile dialog box, on the Measures tab, select the required measures and move them from the Available Measures pane to the Selected Measures pane.
5. On the Hierarchies tab, select the dimensions, hierarchies, and levels to include or exclude in the infotile.
6. On the Members tab, select the required dimension members and move them from the Available Members pane to the Selected Members pane. If you do not select a dimension member, the infotile displays the dimension starting at the top level selected in the Hierarchies tab.
7. On the Layout tab, do the following:
   - Select the graph type for the infotile.
   - Expand the Content Area panel, and then click the Add Row button. You can add up to four tables or graphs to display them in the content area for that infotile.
8. Click Save and Close.
Set Measure Targets for Use in Infotiles

You can enter or update goals for a measure to track performance against the goals. Set targets by editing a measure and updating the measure goal. When the plan summary displays the measure, the goal or target for that measure is visible. You can define goals only for measures that are of data type currency, number, or percent.

For global goals, you can provide a low range or a high range. The ranges are displayed on the user interface when you view a measure in comparison with its goal. Global goals are measure level parameters and are not defined specifically for a data population.

To enter or update measure target goals, follow these steps:

1. Open the Manage Planning Measures page:
   a. In the Navigator, click a Supply Chain Planning work area link.
   b. On the Edit Plan page, click the Tasks panel tab.
   c. In the Tasks panel drawer, click the Manage Planning Measures link.
2. On the Manage Planning Measures page, select the measure and click the Edit icon.
3. On the Edit Measure page, navigate to the Advanced tab, Goals subtab.
4. In the Goals subtab, select whether low values or high values are better.
   For example, high values are better for Gross Margin, but low values are better for Demand at Risk.
5. In the Global Goals section, provide a low range or a high range.
6. Click Save and Close.

Graph Layout Options

The graph layout option is available in the Layout tab when you create or edit a graph using the Manage Tables, Graphs, and Analysis Sets option. In the graph layout options, you can define the type of graph and configure layouts and the dimension of axes. The layout options vary according to the type of graph. For example, a bar graph has X and Y-axis layout options whereas a Pie chart does not have any X or Y axis. General Options is common for all layout options and includes generic information for a graph such as title, font, and position of the graph. You can also preview a graph from the Layout tab before you save the graph. In the preview mode, you can format measures, change the layout, and modify the drill settings.

The following types of graphs are available:

- X and Y axes graphs
  - Vertical bar
  - Horizontal bar
  - Line graph
- X and Y axes graphs with additional parameters
  - Area graph
  - Combination graph
- Bubble graph
  - Pie graph
  - Sunburst graph and Treemap graph
  - Funnel graph and Radar graph
  - Gauge graph

For graphs with an X, Y, or dual Y axes, you can select up to three entities in total: measures are mandatory, and you can select one or two dimension hierarchies. A dual Y-axis graph requires the measures on the Y axis. You must select one measure for the Y2 axis in the Y2 -Axis panel. Axis title and tick label rotation options are available for all axes. Tick label options are also available for the X-axis. For example, skip a certain number of labels for legibility. The Formatting panel contains visual effect options for the graph, such as 2 dimension or 3 dimension, and bar or line style.

A Combination graph includes an area, bar, and line. The measures represented by each of these options are specified in the Formatting panel.

A Bubble graph requires selections for the bubble component of the graph in addition to the X and Y axes options. Select the hierarchy and the bubble sizing measure in the Bubble panel.

A Sunburst graph is comprised of rings. Select the number of rings to display. Each ring represents a level of the hierarchy. The rings are divided into sectors for each member of the level. The size and color of the sector is determined by the measures selected for those options.

A Treemap graph is comprised of rectangles. Select the depth of the rectangles for a hierarchy. The rectangles for a level of the hierarchy are nested within the parent level rectangle. The size and color of the rectangles are determined by the measures selected for those options.

Funnel and Radar graphs require only a hierarchy and measure selection.

Gauge graphs, which are used in infotiles, require measures with goals defined.

Why can't I edit the graph layout options?

If you have created the graph or table, only then you can edit the layout options. Also, you cannot edit any layout options for predefined graphs or tables.

Axis Scale Options

Using Axis Scale Options, you can define the minimum and maximum scale values on the Y-axis, and the incremental values between them. You can define the axis scales using the following options: Minimum, Maximum, and Increment. Minimum indicates the starting point of the axis and Maximum indicates the ending point of the axis. Increment indicates the increase in values that are displayed between maximum and minimum data points. Axis Scale Options is available only for Bar, Line, Area, or Combination graphs and it is applicable for Y-axis and Y2-axis.

For each field, you can define either automatic or user-defined values. If you select Automatic, the planning process automatically adjusts the axis scale for Y-axis and Y2-axis data points. If you select Manual, you have to manually specify the scale for Y-axis and Y2-axis. For example, if you provide Minimum as 3, Maximum as 10, and Increment as 2,
then for Y-axis or Y2-axis the graph displays 3 as the lowest value and 10 as the highest value. The graph also displays data points 5, 7, and 9 as incremental values.

Manage Measure Data in Tables

How You Can Edit Measure Data

While working in one of the Supply Chain Planning work areas, you might be editing measure data in a table. The following table provides a list of some features you can use when doing so, and where each feature is located:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configure Summaries</td>
<td>View menu</td>
</tr>
<tr>
<td>Data Calculation Options</td>
<td>Table toolbar</td>
</tr>
<tr>
<td>Lock and Unlock Cells</td>
<td>If at least one summary is configured:</td>
</tr>
<tr>
<td></td>
<td>Action menu, table toolbar, right-click in cell</td>
</tr>
</tbody>
</table>

Copy and Paste Values in Tables

Use the **Copy** and **Paste** options in the **Actions** menu for a table to copy cell values and paste them in editable cells. You can also copy values from one table to another within the same plan. Pasting overwrites any existing values, and any measures that are dependent on the overwritten measures are recalculated.

If your data is in an external application such as Microsoft Excel, you can use the following procedure to copy and paste your data:

1. Copy your data from the external application.
2. In your work area table, click the first editable cell from which you want the data to be pasted, and select **Actions > Paste from Clipboard**. The Paste from Clipboard dialog box opens.
3. Press Ctrl+V to paste your content in the dialog box. You can further edit your data in the dialog box.
4. Click **Paste and Close**. The copied content is pasted into the editable cells of the table.

Alternatively, you can export your table data to Microsoft Excel using the **Export** icon, work with your data in that application, copy your data, and bring it back into your table by using the **Paste from Clipboard** option. To copy data between plans, export the table data to Microsoft Excel from one plan, and use the **Paste from Clipboard** option to copy data into the other plan.

**Note:** You can paste values in only those cells that fall within your plan horizon. The number and orientation of the cells from which data is copied and the cells into which data is pasted must match. Only numeric data can be copied and pasted. Non-editable cells that are within a range of editable cells are skipped when data is pasted, and a warning is displayed to this effect.
Manage Data Calculation Options When Editing Measure Data in a Table

When you are working in a Supply Chain Planning work area, you might be editing measure data in tables that include dependent measures. You can use the Data Calculation Options choices to determine when calculations are performed. You access Data Calculation Options from the table toolbar for the table you are editing.

The Data Calculation Options choices are:

- Enable Automatic Calculations
- Calculate Now

Enable Automatic Calculations

When you edit data with this option selected, each time you edit a value, calculations are performed for any applicable summaries or other measures that include an expression. The Enable Automatic Calculations choice is the default selection.

Calculate Now

To choose when calculations are performed, you must first deselect Enable Automatic Calculations. When you make edits with the Enable Automatic Calculations choice deselected, you must click the Calculate Now choice when you want calculations to be performed. Calculations will be performed for all edits made since the last time calculations were performed.

If you save a table after making edits, any needed calculations will be performed, but you must refresh the table to see the results.

How You Lock Cells While Editing Measure Data or Allocating Values in a Table

When you are working in a Supply Chain Planning work area, you might be editing measure data in a table. When you have locked cells, edits, including those that spread allocations to other cells, do not change locked cells.

Note: You must configure at least one summary to enable the Lock and Unlock actions.

Lock cells by performing one of the following:

- Click the Lock action in the Actions menu.
- Click the Lock icon on the table toolbar.
- Right-click in an editable cell.
How do I enable the Lock and Unlock actions for a table when editing measure data?

Configure at least one summary to enable the Lock and Unlock actions. Use the View menu for the table to configure summaries.

Can I unlock all cells at once when editing measure data in a table?

Yes, you can unlock all cells at once by using the Unlock All action from the Actions menu. This action is available in the Actions menu only if you have configured summaries.

How can I highlight editable cells in a table?

In the View menu for a table, select Highlight Editable Cells to provide a background color for cells that contain editable measures. Do note that any conditional formatting that has been applied to an editable measure or a table takes precedence over the highlight color. You can choose to save your page layout with this setting.

Aggregate Build Plan

Overview of the Aggregate Build Plan in Sales and Operations Planning

The Aggregate Build Plan table in Sales and Operations Planning Cloud enables you to simultaneously view resource, material, and supplier requirements in the context of demand for an assembly. This report leverages the bill of resources used in aggregate supply planning that defines which component items and resources are used in an assembly item. Use Aggregate Build Plan to focus on the components, resources, and measures that are important to you. For example, you can analyze a material plan for a critical component and its available supplier capacity.

The Aggregate Build Plan also gives you visibility into the upstream manufacturing of subassemblies and their requirements for components and resources. You can quickly identify and reduce supply and resource bottlenecks as well as understand the imbalance in resource capacity and component supply.

When you open the Aggregate Build Plan table for the first time, you will see an empty plan layout. You can configure the layout of the Aggregate Build Plan table to show only the components, resources, and measures that you want to see. You can also define criteria at a product category level for aggregate analysis across shared components and resources.

After selecting the criteria that you want, the Aggregate Build Plan displays the end items, components, and resources that you identified in the criteria. You can expand the root node to see the measures that you included in the layout as well as the selected time level used for the columns. Whether or not you can edit a value in a cell is based on if the measure is editable or not. If the measure is editable, then you can edit the measure in the Aggregate Build Plan.
Use the Drill to action to see additional information related to a table cell. The context of the cell is passed into the resulting table or graph. You can also drill into the Aggregate Build Plan, which is currently supported only for assembly items.

Create Aggregate Build Plan Criteria

When you open the Aggregate Build Plan table directly from a Sales and Operations Plan, you must select criteria to specify which end items, components, and resources from the bill of resources that you want to view. You can also drill into the Aggregate Build Plan from another report with end item context. In this case, the Aggregate Build Plan displays criteria for all of the components and resources in the bill of resources for that assembly. You can then select different criteria for your end items.

Follow these steps to create the criteria for an aggregate build plan report:

1. Open a Sales and Operations plan:
   a. In the Navigator, click the Sales and Operations Planning work area.
   b. Click the Tasks panel tab.
   c. In the Tasks panel drawer, click Manage Plans.
   d. Search for and open your plan.
2. Open the Aggregate Build Plan table:
   a. Click Actions.
   b. In the Open Table, Graph, or Tile Set dialog box, search for Aggregate Build Plan.
   c. Click OK.
3. In the Aggregate Build Plan view, click the Criteria list and then click Manage.
4. In the Manage Criteria dialog box, click Add and enter the values for Name, Description, and Access fields.
5. In the Details section, select Item or Category and then do one of the following:
   o If your end item criteria is Item, then select an item and organization from the list. You can leave the Organization field empty.
   o If your end item criteria is Category, then select a catalog and category from the list.
6. Click Refresh Lists.
   The refresh builds the list of components and resources used in the assembly of the selected end item or category from the bill of resources.
7. Select the components and resources that you want to see in your report:
   o Select All or a specific component for the item.
   o Select All of a specific resource for the item.
8. Click Save and Close.

Create an Aggregate Build Plan Layout

When you work in the Aggregate Build Plan table in a Sales and Operations Planning work area, there is a predefined layout to display certain measures for items and resources. You can select which end items, components, and resources to display by first setting up criteria. Next, you can create your own layout with preferred measures to display and for which time levels to display for the end items, components, and resources. You create your own layout by using the
Manage action from the Layout choice list in the Aggregate Build Plan dialog box. You can set this layout as the default layout for all other sales and operations plans.

Follow these steps to create an Aggregate Build Plan layout.

1. Open a Sales and Operations plan:
   a. In the Navigator, click the Sales and Operations Planning work area.
   b. Click the Tasks panel tab.
   c. In the Tasks panel drawer, click Manage Plans.
   d. Search for and open your plan.

2. Open the Aggregate Build Plan table:
   a. Click Actions.
   b. In the Open Table, Graph, or Tile Set dialog box, search for Aggregate Build Plan.
   c. Click OK.

3. In the Aggregate Build Plan view, click the Layout list and then click Manage.

4. In the Manage Layouts dialog box, click the Add button and do the following:
   a. Enter the values for Name, Description, Access, and Time fields.
   b. Optionally, select the Default check box to make this layout the default layout.

5. In the Details section in the Manage Layouts dialog box, select your preferred measures in the Available column and move them to the Selected column for the following subtabs:
   - End Item Measures
   - Component Measures
   - Resource Measures
   - Supplier Measures

6. When done, click Save and Close.
3 Planning Data Collections

Overview of Data Collections for Supply Chain Planning

To run plans from one of the Supply Chain Planning work areas, you must collect data into a planning data repository. Order promising and order management processes also use the planning data repository to promise and manage orders.

To collect data into the planning data repository, you can perform these tasks from one of the Supply Chain Planning work areas:

- Collect Planning Data: Use this task when you collect data from the Oracle Fusion source system.
- Load Planning Data from Files: Use this task when you collect data from a completely external source system.

Depending on your security privileges, you may need to manually add these tasks. In the Setup and Maintenance work area, use the following:

- Offering: Supply Chain Planning
- Functional Area: Supply Chain Planning Configuration
- Task: Collect Planning Data

The following figure illustrates the collections processes that you can use to populate the planning data repository.
Collect Planning Data

There are two steps involved in the data collection process. The Collect Planning Data process first pulls data from the Oracle Fusion source system into staging tables. The process then loads data from the staging tables into the planning data repository.

On the Collect Planning Data page, use the following tabs to select what data you want to collect:

- Reference Data
- Demand Planning Data
- Supply Planning Data

Most of the reference data are global entities. Global entities are common for all source systems. For example, Units of Measure (UOM) is common for all source systems. The supply planning and demand planning data are transactional data. Most of the transactional data are local entities. Local entities are specific to each source system. For example, On-hand Quantity is specific for each source system.

You can also select collection filters to further refine what data you want to collect. You can save your selections to collection templates.

Load Planning Data from Files

Use this option to populate the planning data repository using CSV files:

To load the planning data from files, follow these steps:

1. Create the CSV files. To create the CSV files, you can use a predefined set of Microsoft Excel files as import templates.
2. Import the CSV files. From the navigator, click File Import and Export, and create a new import. Specify scm/planningDataLoader/Import for the account.
3. Submit the Load Planning Data from Files process. When you submit the process, the process first pushes the data from the CSV files into the staging tables. The process then loads the data from the staging tables into the planning data repository.

Related Topics

- Update Existing Setup Data

Global Entities

Within data collections, Oracle Fusion Supply Chain Planning refers to certain business entities as global entities. Global entities are specific for each instance and are common for all source systems. They are common without regard to whether they are collected from the Oracle Fusion source system or collected from an external source system using the file-based data import (FBDI) method.

When collecting data for a global entity, the planning data repository stores only one record for each instance of the global entity. The data collections process removes the source system reference from the global entity and stores the data in the data repository. If the data collections process collects the same instance of a global entity from more than one source system, the data repository stores the value from the last collection.
For example, the following scenario describes the collection method of the global entity called units of measure (UOM) from three source systems, namely source system A, B, and C respectively.

- Source system A has an instance of UOM. During the collection of UOMs from source system A, the kilogram UOM is collected. This is the first time the kilogram UOM is collected. The data collections process creates a kilogram record in the data repository.

- Source system B does not have any instances of UOM. During the collection of UOMs from source system B, the data collections process does not collect the kilogram value. Since there was no record for the kilogram UOM in source system B, the data collections process does not change the kilogram record in the data repository. The record of the kilogram value from source system A is still valid.

- Source system C has an instance of UOM. During the collection of UOMs from source system C, the kilogram UOM is again collected. The data collections process registers the kilogram record in the data repository to match the values from source system C.

Note: When you use the FBDI collection method, the global entity files require a source system. The collections framework validates that the source system matches each record’s source system. A source system identifier marks each data record.

In Supply Chain Planning, the following entities are classified as global entities:

- Order Orchestration Reference Objects
- Units of Measure and UOM Conversions
- Demand Classes
- Currency and Currency Conversion Class
- Shipping Methods (Carrier, Mode of Transport, Service Level)
- Customer and Customer Site
- Suppliers and Supplier Sites
- Regions and Zones
- Approved Supplier List
- Supplier Capacity
- Planners

Data Collection Types for Supply Chain Planning

When you collect planning data, one of the parameters you specify for the Collect Planning Data task is the Collection Type parameter. You can select this task from any of your Supply Chain Planning work areas. For the Collection Type parameter, you can select one of the following values:

- Targeted: Choose the Targeted collection type when you want to collect a significant volume of source system data. Typically, you use the Targeted collection type in scenarios such as bulk upload of transaction data, instance upgrade, and change in collection filters.

- Net change: Choose the Net change collection type when you want to collect changed data and new records since the last successful collection cycle.

- Automatic selection: Choose the Automatic collection type when you want the planning process to decide and automatically select an appropriate collection type for each of the entities.
**Targeted**

You use the Targeted collection type when you want to perform a complete refresh of the data in the data repository. In this mode, the planning process deletes the existing data for the selected entities from the data repository. Next, if subsequently collected from the source, the data for the selected entities replaces the deleted data.

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**Note:** For the following data collection entities, you can use only the Targeted collection type: Item Costs, Resource Availability, Fiscal Calendars, and all Shipment and Booking History data.

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**Net change**

When you use the Net Change collection type, you collect data incrementally. The Net Change collection type collects only changed or new data. Collecting data using the Net Change collection type is usually faster than using the Targeted collection type. You typically use the Net Change collection type when you have previously performed a Targeted collection, and now you want to keep your planning data current with your execution system data. You cannot select the demand planning data when the collection type is Net Change.

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**Automatic selection**

You use the Automatic collection type when you are not sure which collection type to select and you want the planning process to decide the collection type for each entity. The planning process evaluates each entity on multiple factors, such as the last collected date for an entity, and decides whether to perform a Targeted or a Net Change collection for the entity. You can manually select the entities that you want to collect or you can use one of the predefined templates to select your entities. If you select one of the predefined templates, you can’t make any changes in the Reference Data, Demand Planning Data, and Supply Planning Data tabs.

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**Manage Planning Source Systems for Data Collections**

To populate the planning data repository, also known as the order orchestration and planning data repository, you collect data from the Oracle Fusion source system. On the Manage Planning Source Systems page in one of the Supply Chain Planning work areas, enable organizations for collections. Depending on your security privilege, you can also enable organizations from the Setup and Maintenance work area.

In the Setup and Maintenance work area, use the following:

- Offering: Supply Chain Planning
- Functional Area: Supply Chain Planning Configuration
- Task: Manage Planning Source Systems

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**The Oracle Fusion Source System**

The Oracle Fusion source system is included as a source system for data collection. Supply chain planning, order orchestration, and order promising processes use data that are stored in the planning data repository. You ensure the Collections Allowed check box is enabled and manage which organizations you enable for collections.

To open the Manage Trading Community Source Systems page, navigate to the Setup and Maintenance work area and use the following:

- Offering: Supply Chain Planning
• Functional Area: Supply Chain Planning Configuration
• Task: Manage Trading Community Source System

External Source Systems
You can also allow collections for external source systems if you will be loading planning data from files for Oracle Fusion Global Order Promising. You must first define the external source system on the Manage Trading Community Source Systems.

There are two types of external source systems: Others and External.

Version External
The version External source system indicates that the source system is not connected to any other Oracle Fusion applications. This source system is not integrated with Oracle Fusion Product Data Model, Oracle Fusion Trading Community Model, and Oracle Fusion Order Management Cloud. The external source system is also referred as a completely external source system. You cannot enable any other source system settings that are related to other Oracle Fusion applications. You can select the Collections allowed check box now or later depending on when you want to start collecting data. This enables the source system for data collections using the file-based import process.

Version Others
The version Others source system indicates that the source system is connected to other Oracle Fusion applications. This source system is integrated for Oracle Fusion Product Data Model, Oracle Fusion Trading Community Model, and Oracle Fusion Order Management Cloud. The following conditions are applicable when the external source is Others.

• External system data for Items, Item Structures, and Catalogs is uploaded to Oracle Product Data Model Cloud
• External system data for Customers, Customer Sites, Regions and Zones is uploaded to Oracle Trading Community Model Cloud
• External system data for Sales Orders is uploaded to Oracle Order Management Cloud

For more information on types of data that can be collected for each source system, see the Import Templates Used to Create CSV Files for Supply Chain Planning topic.

Organizations Enabled for Data Collections
The process for enabling organizations varies depending on the version of the source system.

To enable organizations for data collections when the source system version is Oracle Fusion, perform the following steps:

1. Click the Manage Organization List button for your Oracle Fusion source system.
2. Click the Refresh Organization List button to update the organizations list
3. Select the Enable for Collections check box for the organizations from which you want to collect data.

Tip: When performing collections during your initial setup, collect order orchestration reference objects from the predefined Oracle Fusion source system, and consider collecting organizations. After enabling organizations for collection, collect organizations first. You can confirm the collection results on the Supply Network Model page.
To enable organizations for data collections when the source system version is **External** (completely external source system), upload organizations using the file-based import process. The organizations are automatically enabled for collections.

To enable organizations for data collections when the source system version is **Others**, perform the following steps:

1. Define an organization as an item-organization in the product data model.
2. Upload the organization using the file-based import process and associate the organization with **Others** source system.

**Related Topics**

- Considerations for Enabling Organizations for Data Collections

**How the Order Orchestration and Order Promising Processes Use the Collected Planning Data**

You perform data collections to populate the planning data repository. In addition to being used by Supply Chain Planning processes, the collected data is used by Oracle Fusion Order Management order orchestration processes and by Oracle Fusion Global Order Promising processes.

**Data Collections**

You must perform data collections to populate the planning data repository, also called the order orchestration and planning data repository, with data from the Oracle Fusion source system or from a completely external source system. When you load data from an external source system, use the XLSM files to organize your data in the required format and then convert the data into CSV files. You can then upload the CSV files to the planning data repository.

**Order Orchestration**

Order orchestration processes use some reference data directly from the planning data repository. You must perform data collections for the order orchestration reference entities even if you are not using the Supply Chain Planning work areas.

**Note:** Before collecting data from your Oracle Fusion source system, you must define at least one organization for the source system. After you have set up at least one organization, you must update the organization list on the Manage Planning Source Systems page and then enable at least one of the organizations for collections. If you have not enabled any organization, then the collections process ends with an error.

**Order Promising**

The Global Order Promising processes use an in-memory copy of the data from the planning data repository. When order orchestration processes send a scheduling request or a check availability request to Oracle Fusion Global Order Promising, the order promising processes use the data stored in main memory to determine the response to send back to order orchestration. You must refresh the Global Order Promising data store after every collections so that the main memory always reflect the current.
Related Topics

- Refresh the Global Order Promising Server

How You Enable Cross-References of Entities by Data Collections

Cross-references enable you to locate the correct source value for each cross-referenced entity. When you enable entities for cross-referencing, data collection pays attention to the cross-references that you have set up for certain values.

To enable cross-referencing of entities, click the Manage Planning Data Collection Processes task from your supply chain planning work area. Select the source system from the list, and then enable the available entities that you want to cross-reference during data collections.

You can view the cross-referenced data for each entity on the Cross-Reference Relationships for Collected Data page in the Plan Inputs work area.

How Planning Processes Collect Different Work Definitions and Item Structures

You may be concerned that the work definition and item structure data in your supply chain planning work area does not match with what was defined in Oracle Manufacturing Cloud. You don’t need to worry. The planning application collects and uses data based on how the work definitions and item structures are defined and associated in the manufacturing source system.

Work Definitions and Item Structures in the Source System

The work definition is a primary source of data for the planning application. The planning process uses the work definition of make order items to determine component and resource requirements. In case the work definition is not defined, the planning process uses the defined item structure, but to plan for components only. If a work definition is defined and no item structure is associated to it, then you can manually add ad hoc components to it. If an item structure is associated to it, you can still add ad hoc components to the work definition, alongside the components in the item structure. Remember that while a work definition can be associated with only one item structure, one item structure can be associated with several work definitions within the parent item.
Work Definitions and Item Structures in the Planning Data Repository

In the manufacturing source system, the work definitions and item structures for an item can be defined and associated in different ways. The following table lists the most common source system combinations and how the collections and run plan processes proceed accordingly:

<table>
<thead>
<tr>
<th>Manufacturing Cloud Definition</th>
<th>Item Structure Name and Work Definition Name in the Planning Data Repository</th>
<th>Planning Collections Processes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Only item structure is defined for an item. No work definition is defined.</td>
<td>Item structure name exists, no work definition name</td>
<td>The planning process collects the item structure information but does not collect information for routing, operations, or item resources. The planning process uses item structure to plan components and does not plan resources.</td>
</tr>
<tr>
<td>Only work definition is defined for an item. No item structure is defined.</td>
<td>Work definition name exists, no item structure name</td>
<td>The planning process collects the work definition information to populate the item structure and routing information. The planning process populates the component information and operation sequence number in the item structure based on the ad hoc components and operation assignment available in the work definition. The planning process uses the work definition information to plan both components and resources.</td>
</tr>
<tr>
<td>Both item structure and work definition are defined for the item.</td>
<td>Both work definition name and item structure name exist</td>
<td>The planning process uses the components that are associated with the work definition to plan. The planning process does not consider any components of item structure that are not associated with the work definition. You can override the item structure component usage within the work definition. The planning process collects component attributes (such as component effectiveness) from the item structure if the components are associated with the work definition. The planning process uses the work definition to plan resources.</td>
</tr>
</tbody>
</table>
Enable External Data Collection for the Oracle Fusion Source System

Enable external data collection if you want to load transactional data from external systems. Typically, you do this if some of your supply chain processes are managed in external applications. You load the transactional data from these applications using file-based data imports (FBDI).

You can use external data sources for these functional areas: Inventory and Materials Management, Procurement, Order Management, and Manufacturing. When you enable external data collection for a functional area, be aware of these restrictions:

- You can't use configure-to-order, drop shipment, and back-to-back fulfillment.
- The entities associated with the functional area are no longer available for Oracle Fusion source collection. For example, if you enable Order Management, the Sales Orders entity won't be available on the Collect Planning Data page for you to select for Oracle Fusion source collection.

This table lists the entities for each functional area.

<table>
<thead>
<tr>
<th>Functional Area</th>
<th>Entities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inventory and Materials Management</td>
<td>On-hand Quantity and Transfer Orders</td>
</tr>
<tr>
<td>Procurement</td>
<td>Purchase Orders and Requisitions</td>
</tr>
<tr>
<td>Order Management</td>
<td>Sales Orders and Reservations</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>Work Order Supplies, Resource Availability, Resources, Work Definitions, and Item Structures</td>
</tr>
</tbody>
</table>
Enable External Data Collection

Use these steps to enable external data collection:

1. Select the **Manage Planning Source Systems** task in the Tasks panel from any Supply Planning work area page. Or use this task in the Setup and Maintenance work area:
   - **Offering:** Supply Chain Planning
   - **Functional Area:** Supply Chain Planning Configuration
   - **Task:** Manage Planning Source Systems

2. In the list of source systems, select the row that has Oracle Fusion in the **Version** column.

3. In the Actions menu, click **Select Data Sources**.

4. Select the **Enable External Data** check box, and then select the functional areas that you want to source transactional entities for.

   **Note:** Every time you enable or disable external data collection, you must run a targeted data collection to ensure complete refresh of data in the data repository.

Collect Planning Data from the Oracle Fusion Source System

How You Collect Different Data Types for Supply Chain Planning

When you collect data, you collect data from three categories: reference data, demand data, and supply data. On the Collect Planning Data page there is a tab for each of these categories.

The collected data are stored in the planning data repository.
The following figure illustrates the three categories of data that you collect from the Oracle Fusion source system to the planning data repository.

**Explanation of Callouts**

1. Reference data is primarily sourced from Oracle Fusion SCM Cloud
2. Demand data comes from Oracle Order Management Cloud Service and Oracle Materials Management Cloud Service
3. Supply data is sourced from Oracle Inventory Management Cloud Service, Oracle Manufacturing Cloud Service, and Oracle Purchasing Cloud Service

**Reference Data**

The collection process begins with reference data, which is primarily sourced from Oracle Fusion SCM Cloud. You collect the data collection entities, such as basic item, resource, organization, customers and suppliers, and calendar data.

*Note: Oracle Fusion Sales and Operations Planning uses the Bill of Resources entity to link the make items with their associated components and resource requirements. For more information on collecting Bill of Resources from an external source system, see the Loading Planning Data from Files section.*

You also use Oracle Supply Chain Planning Cloud to collect the following items:

- Item structures: To explode item-level demand into component demands and supplies.
- Work Definitions: To assign the component and resource requirements for make items.
- Units of measure: To align plan data and to convert plans from one set of units to another.
- Costs: To review plans in financial terms and evaluate the financial impact of planning decisions.
Demand Data
You collect demand data from two potential sources:

- Sales orders that flow from Oracle Order Management Cloud Service: You can use this as the basis of the demand forecast, while current orders can consume the demand in near-term forecast time buckets.
- Shipment history from Oracle Materials Management Cloud Service: You can use this to generate a shipments forecast.

Supply Data
You collect supply data from three sources:

- Oracle Inventory Management Cloud Service: This provides data related to on hand inventory, reservations, material transfers, in-transit supplies, and receipts.
- Oracle Manufacturing Cloud Service: This provides work in process status and any manufacturing work orders.
- Oracle Purchasing Cloud Service: This provides purchase requisitions and purchase orders.

Collection Filters and Collection Templates
You use collection filters and collection templates when you need to collect some common set of entities repeatedly. The collection filters and collection templates are located on the Collect Planning Data page. To open the Collect Planning Data page, click the Collect Planning Data task from one of the Supply Chain Planning work areas.

Depending on your security privileges, you can also open the Collect Planning Data page from the Setup and Maintenance work area. In the Setup and Maintenance work area, use the following:

- Offering: Supply Chain Planning
- Functional Area: Supply Chain Planning Configuration
- Task: Collect Planning Data

Collection Filters
Use collection filters to improve the performance and efficiency of the collections process, and to avoid accumulation of irrelevant data in the planning data repository. You can use several filter criteria while performing collections, such as by employing catalogs, order types, and price lists. You can also use date-based filters for collecting shipment and booking history information.

Enabling Collection Filters
To enable collection filters, you must first run the schedule process called Load Filter Names for Planning Data Collection from the Scheduled Processes work area. When you run the scheduled process, the filters get enabled in the Collect Planning Data page. Then, you can apply the filters from the next collection.

Collection Templates
Use collection templates when you want to collect a set of data repeatedly over a period. You can select either one of the predefined templates that serves your specific need, or you can create your own template and save it for future use.

When you select a predefined template from the list, the Collection Type field is defaulted to Automatic selection and you cannot edit the field. Also, when you select a predefined template, the Select Collection Filters field is disabled.
You can create a collection template on the Collect Planning Data page by selecting the data collection entities and saving the template for future use. For example, if you frequently collect certain supply planning transactional entities, such as On Hand, Purchase Orders, and Purchase Requisitions, then save these entities as a collection template. It reduces the overhead of selecting the same entities for subsequent collection cycles.

If the template file contains any error during the upload process, rectify the issue found in the log file and upload the template file again.

Collect Data Using Targeted Collection Type

To perform a complete refresh of the data repository used by the Supply Chain Planning products, run a targeted collection. You can run the targeted collection immediately or you can schedule the process to run later. Demand planning data can only be collected by using the Targeted collection type.

**Note:** Before collecting demand planning data, you must successfully run the Load Filter Names for Planning Data Collection scheduled process.

Perform the following steps to collect reference data, demand planning data, and supply planning data using the Targeted collection type.

1. Access the Collect Planning Data page from a Supply Planning work area or the Setup and Maintenance work area.
   - If you are in one of the Supply chain Planning work areas:
     1. Click the Tasks panel tab.
     2. In the Tasks panel drawer, click the **Collect Planning Data** link.
   - If you are in the Setup and Maintenance work area, then select the following:
     - Offering: Supply Chain Planning
     - Functional Area: Supply Chain Planning Configuration
     - Task: Collect Planning Data

2. On the Collect Planning Data page, complete the following steps.
   - On the Parameters tab:
     1. Select your source system.
     2. For the collection type, select Targeted.
     3. Click **Select Collection Filters** to select the collection filters.
   - On the Reference Data subtab, move the required reference entities to the Selected Entities area.
   - On the Demand Planning Data subtab, set options to collect the historical demand data in the planning data repository. The planning process uses the historical demand data for statistical forecasting.
     1. **Collection Time Frame Options:** You can specify a fixed or rolling date range for which to collect data.
     2. The **Fixed Date Range** option enables you to collect history data within a fixed date range that you specify.
The **Rolling Date Range** option enables you to collect the history data for the number of days that you specify. For example, if you forecast weekly, specify 7 in the **Number of Days to Collect** field to collect the demand history data once per week. The data collections collect the demand history data for the latest week.

Select **Roll off time periods automatically** to truncate the history data by the number of days that you specify in the **Number of days to keep** field each time you run collections for the demand history data. For example, if you prefer to forecast each week based on the history data of 52 weeks, select the **Roll off time periods automatically** check box and specify **Number of days to keep** as 364 days. This setting ensures that as you collect data every week, you keep the most recent history of 52 weeks and automatically purge history data older than 52 weeks.

- **History Measures and Attributes:** Select your shipments history and bookings history measures.
- **History Data Options:** To collect only specific order types, select from the **Order Types to Include** list of values. By default, all order types are included.

Select the **Collect amount data for history** check box to collect amount data.

If you select the **Collect historical transfer orders** check box, transfer orders are collected and are included in the shipments and bookings measures.

- **Additional Options:** Select additional options for collections.
  - **Collect Price Lists:** Collect the price lists specified in the collections filter for price lists, or collect all price lists if no filter is specified.
  - **Collect Configure to Order Data:** If you selected history measures and attributes, then select the relevant check boxes to collect shipment history options and booking history options.
  - **Sales Organization Hierarchy:** Select **Enable sales organization hierarchy collection** to collect one or more sales hierarchies.

- On the Supply Planning Data subtab:
  i. Move the required supply entities to the Selected Entities area.
  ii. If you collect resource availability, then select a date range type: **Fixed** or **Relative to collection run date**.

If you selected **Fixed**, then provide a start date and an end date for collecting resource availability.

If you selected **Relative to collection run date**, then enter a number of days in the **Collection Window in Days** field. The number that you enter determines a collection window in days to collect resource availability based on a rolling time window. That rolling time window adjusts itself, based on the date that you run collections. For example, if you specify 90, then resource availability is collected for the next 90 days each time from the date of the collection run.

**Note:** You can save your date range type selection for resource availability collection as a collection template to use later.

iii. You can collect the existing data for the resource availability.
iv. You can also regenerate the resource availability data and then collect the data. If you select the **Regenerate data, and then collect** option, the collections process runs the **Update Resource Availability Job** scheduled process first and then collects the resource availability data.

3. (Optional) Click the Schedule tab and set collections to run as soon as possible or schedule to run at a different time.
4. Click Submit to start the collections process.
5. Monitor the collection status using the Scheduled Processes page.
6. Review the collected data in the Plan Inputs work area.

Related Topics
- Set Up Forecast Consumption for Transfer Orders

Collect Data Using Net Change Collection Type

You can collect data from the Oracle Fusion source system by running the net change collection or by scheduling to run the process later. Before running a Net Change collection, you must run a Targeted collection for the selected entities. After the first Targeted collection, you can run Net Change collections.

Perform the following procedure to collect reference data and supply planning data using the net change collection type:

1. If you are in one of the Supply Chain Planning work areas, then click the Tasks panel tab. In the Tasks panel drawer, click the Collect Planning Data task. If you are in the Setup and Maintenance work area, then use the following:
   - Offering: Supply Chain Planning
   - Functional Area: Supply Chain Planning Configuration
   - Task: Collect Planning Data
2. Complete the following parameters for the Collect Planning Data process:
   a. Select your source system.
   b. Select the collection type as Net change.
   
   **Note:** You cannot make any changes to the filter criteria and demand planning data in the net change collection type.
   
   c. In the Reference Data tab, move the required reference entities to the Selected Entities area.
   d. In the Supplies Planning Data tab, move the required supply entities to the Selected Entities area.
3. (Optional) Click the Schedule tab and set collections to run as soon as possible or schedule to run at a different time.
4. Click Submit to initiate the collections process.
5. Monitor the collection status using the Scheduled Processes page.
6. Review the collected data in the Plan Inputs work area.

Related Topics
- Update Existing Setup Data

Load Planning Data from Others and External Source Systems
How You Load Planning Data from Files

You upload data using CSV files for specific business objects using the targeted or net change method.

**Note:** To create the CSV files, you can use a set of Microsoft Excel template files that are provided for this purpose. You can download the templates from the File-Based Data Import for SCM Cloud guide in the Oracle Help Center.

You use the targeted mode when you want to refresh data for selected entities in the planning data repository. You use the net change mode to collect data incrementally. The net change collections mode collects only the changed or new data. Data collection using the net change mode is fast compared to the targeted mode. The net change mode is used to retain planning data to current with that of the executing system.

The following figure illustrates the process of collecting data from files.

To load planning data from files, you perform the following steps:

1. Create CSV files using Microsoft Excel template
2. Run the process to load planning data from files
3. Verify the load planning data process
4. Review the loaded data
Create CSV Files to Load Planning Data

To perform the Load Planning Data from Files task in one of the Supply Chain Planning work areas or Setup and Maintenance work area, you must prepare the data you want to load. You must create the necessary CSV files used to create files for import. This procedure explains how to create CSV files to prepare planning data for loading.

1. Locate the applicable file import templates (XLSM files) in the following guide: File Based Data Import for Oracle Supply Chain Management Cloud. Extract the templates to a local space.

   For additional information about creating and importing CSV files, see the following section in the Oracle SCM Cloud Implementing Common Features for Oracle SCM Cloud guide: External Integration chapter, External Data Integration Services for Oracle Cloud section.

2. Open the template file for the entity you are preparing and complete the file import template worksheet.

   You must enable the macros in the template file before generating the CSV file.

   **Caution:** For the cells that contain dates, ensure that the data is set to the correct format in the data type. For example, date must be set to YYYY/MM/DD.

3. After you finish preparing the data in the worksheet, generate the CSV file. The Generate CSV File button is located in the Instructions and CSV Generation worksheet of the workbook.

4. When you save the generated CSV file, you must use the suggested name of the entity. You can add underscore and add additional characters to the file name. For example, you can name the CSV file as ShipmentHistory_abc.csv and you can name the file as LoadingCSV.zip.

5. Compress the CSV file into a zipped file format using a compression utility. You can provide any name to the zipped file.

   **Note:** You can include multiple CSV files in a single compressed file for a source system. The load process uploads them in a sequential order. Select the CSV files and compress them directly. Do not compress the parent folder that contains the files.

This completes the preparation of a file that you will upload to collect planning data.

Data Collection Sequence

This topic explores the sequence that you should follow for data collection. Data collection involves collecting entities in a predefined sequence. The collected entities form the basis for supply planning calculations. To have accurate data, you must ensure to collect the entities in a proper sequence. You cannot collect some entities without collecting their precursor entities. The data collection sequence is very crucial when you collect data from an external source system using CSV files.

If you run targeted collections for all entities, you can ignore the sequence for collections because targeted collections automate the collection sequence for all entities within a single collections request. If you collect many entities in a single request, collections will process them according to the sequences shown in this topic. If you collect only a few entities, then you must be aware of the collections sequence information. For example, you should not collect work orders before you collect items or resources.
To make the workflow simple, the collection sequence is divided into two parts - Part A and Part B. The collection entities in Part B are dependent on the collection entities in Part A. You must collect the entities in Part A before you collect the entities in Part B. Also, the collection entities are grouped together for easier presentation. The data groups in Part A are:

- Collections Sequence Part A for Item Data
- Collections Sequence Part A for Region, Location, and Customer Data
- Collections Sequence Part A for Currency, Calendar, Demand Class, and UOM Data

The data groups in Part B are:

- Collections Sequence Part B for Sales Order and Assignment Sets
- Collection Sequence Part B for Work Orders, Work Definition, and Item Structure

Every collection sequence in Part A starts with defining a source system where the collected data will reside. If you are collecting data to the same source system, you define the source system only once. Then, use the same source system to collect all the entities.

The following figure provides an overview of the data collection sequence. The overview shows how Part A and Part B fit together to form a complete data collection flow.

**Data Collection Sequence Overview**

Part A:
- Collection Sequence Part A for Currency, Calendar, Demand Class, and UOM Data
- Collection Sequence Part A for Region, Location, and Customer Data
- Collection Sequence Part A for Item Data

Continue to Collection Sequence Part B

Part B:
- Collection Sequence Part B for Sales Order and Assignment Sets
- Collection Sequence Part B for Work Orders, Work Definition, Item Structure

**Collections Sequence Part A for Item Data**
The following image shows the collections sequence to follow while collecting Item data from external source systems. This image represents only half of the entities for collecting Item data.
Note: The Organization entity is marked with an asterisk because you can collect other entities such as Planner, Item Cost, Subinventory, Carrier, Calendar Assignment, Supplier, and Supplier Site after collecting Organization. For more information on the collection sequence for these entities, see the Collections Sequence Part A for Currency, Calendar, Demand Class, and UOM Data figure. Refer to the entities that are collected after Organization. Also, ensure that you collect Location before collecting Supplier Site.

Collection Sequence Part A for Item Data

When you collect the data described here, continue to the collection sequence Part B described in the following subsections.

- Collection Sequence Part B for Sales and Order and Assignment Sets
- Collection Sequence Part B for Work Orders, Work Definition, and Item Structure
Collections Sequence Part A for Region, Location, and Customer Data

The following image shows the collections sequence to follow while collecting Regions, and Customers data from external source systems. This image represents only half of the entities for Item data.

When you collect the data described here, continue to the collection sequence Part B described in the following subsections.

- Collection Sequence Part B for Sales and Order and Assignment Sets
- Collection Sequence Part B for Work Orders, Work Definition, and Item Structure
Collections Sequence Part A for Currency, Calendar, Demand Class, and UOM Data

The following image shows the collections sequence to follow while collecting Currency, Calendar, Demand Class, and UOM data from external source systems. Also, ensure that you collect Location before collecting Supplier Site.

**Note:** The Calendar entity is marked with an asterisk because there are other entities that are associated with Calendar that you must collect in a sequence. To collect other entities associated with Calendar, see the Calendar Upload Sequence figure.
When you collect the data described here, continue to the collection sequence Part B described in the following subsections.

- Collection Sequence Part B for Sales and Order and Assignment Sets
- Collection Sequence Part B for Work Orders, Work Definition, and Item Structure
Collection Sequence for Calendar Data

The following image shows the collections sequence to follow for collecting the Calendar data. Calendar data is a part of the data collection in Part A. You collect the Calendar data in the following subsection: Collection Sequence Part A for Currency, Calendar, Demand Class, and UOM Data.

Calendar Upload Sequence

- Calendar
- Calendar Shifts
- Calendar Exceptions
- Period Start Days
- Week Start Dates
- Calendar Workday Pattern
- Generate Calendar Dates Post Collection
Collections Sequence Part B for Sales Order and Assignment Sets

The following image shows the collections sequence to follow while collecting Sales Order and Assignment Sets data from external source systems. The data entities in Part B are dependent on Part A. So, you must collect entities listed in Part A before you collect the entities in Part B.

Collections Sequence Part B for Sales Orders and Assignments Sets

- Ship Methods
- Sales Orders
- ASL, Supplier Capacity
- Planned Orders
- On Hand
- Transfer Order
- Purchase Orders
- Reservations
- Sourcing Rules, Sourcing Assignments, Source Organization, Receipt Organization
- Forecasts

Continue to Collection Sequence Part B

Collection Sequence Part A
Collection Sequence Part B for Work Orders, Work Definition, and Item Structures

The following image shows the collections sequence to follow while collecting Work Orders, Work Definition, and Item Structure data from external source systems. The data entities in Part B are dependent on Part A. So, you must collect entities listed in Part A before you collect the entities in Part B.

Templates Used to Create CSV Files

You can use the Microsoft Excel templates (XLSM files) to prepare the data for the supported collection entities. The templates are listed in the following guide: File-Based Data Import for Oracle Supply Chain Management Cloud. Extract the templates to a local drive, enter appropriate data as described in the template, and generate CSV files. Compress
the CSV files to a zipped file format and upload the .zip file to the Universal Content Manager using the File Import and Export utility. The data is then loaded from the Universal Content Manager to the planning data repository.

**Collect Data from the Oracle Fusion Source**

The following table lists the collections entities that can be loaded into the planning data repository for the Oracle Fusion source. The Collection Entity column provides the name of the entities for which you can collect the data. The XLSM File Name column provides the template name that you will download for the respective collection entity. Download the XLSM template from the File-Based Data Import for Oracle Supply Chain Management Cloud guide (FBDI guide). The Link in Data Import Guide column provides the name of the topic in the FBDI guide from where you will download the template. For example, to collect data for the Item Costs collection entity, refer to the Item Cost Import topic in the FBDI guide.

<table>
<thead>
<tr>
<th>Collections Entity</th>
<th>Link in Data Import Guide</th>
<th>XLSM File Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Costs</td>
<td>Supply Chain Planning Item Cost</td>
<td>ScpItemCostImportTemplate. xlsm</td>
</tr>
<tr>
<td>Customer Specific Item Relationships</td>
<td>Supply Chain Planning Item Substitute</td>
<td>ScpItemSubstituteImportTemplate. xlsm</td>
</tr>
<tr>
<td>Planners</td>
<td>Supply Chain Planning Planners</td>
<td>ScpPlannersImportTemplate. xlsm</td>
</tr>
<tr>
<td>Item Suppliers</td>
<td>Supply Chain Planning Approved Supplier List</td>
<td>ScpApprovedSupplierListImportTemplate. xlsx</td>
</tr>
<tr>
<td>Demand Classes</td>
<td>Supply Chain Planning Demand Classes</td>
<td>ScpDemandClassImportTemplate. xlsm</td>
</tr>
<tr>
<td>Allocation Assignments and Allocation Rules</td>
<td>Supply Chain Planning Planning Allocation Rules</td>
<td>ScpPlanningAllocationRulesImportTemplate. xlsx</td>
</tr>
<tr>
<td>ATP Assignments and ATP Rules</td>
<td>Supply Chain Planning Available-to-Promise Rules</td>
<td>ScpATPRulesImportTemplate. xlsm</td>
</tr>
<tr>
<td>Supply Update Rules</td>
<td>Supply Chain Planning Real Time Supply Updates</td>
<td>ScpRealTimeSupplyUpdatesImportTemplate. xlsx</td>
</tr>
<tr>
<td>Measures</td>
<td>Supply Chain Planning Measures</td>
<td>ScpMeasuresImportTemplate. xlsm</td>
</tr>
<tr>
<td>Booking History</td>
<td>Supply Chain Planning Bookings History</td>
<td>ScpBookingHistoryImportTemplate. xlsm</td>
</tr>
<tr>
<td>Collections Entity</td>
<td>Link in Data Import Guide</td>
<td>XLSM File Name</td>
</tr>
<tr>
<td>--------------------------</td>
<td>---------------------------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Note: This template has been superseded by the generic template ScpMeasuresImportTemplate.xlsm but will continue to be supported. Future enhancements will be made only to the generic measures template.</td>
</tr>
<tr>
<td>Option Booking History</td>
<td>Supply Chain Planning Option Bookings History</td>
<td>ScpOptionBookingHistoryImportTemplate.xlsm</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Note: This template has been superseded by the generic template ScpMeasuresImportTemplate.xlsm but will continue to be supported. Future enhancements will be made only to the generic measures template.</td>
</tr>
<tr>
<td>Shipment History</td>
<td>Supply Chain Planning Shipments History</td>
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<td>Note: This template has been superseded by the generic template ScpMeasuresImportTemplate.xlsm but will continue to be supported. Future enhancements will be made only to the generic measures template.</td>
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<td>Link in Data Import Guide</td>
<td>XLSM File Name</td>
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<tr>
<td>Causal Factors</td>
<td>Supply Chain Planning Causal Factors</td>
<td>ScpCausalFactorsImportTemplate. xlsm</td>
</tr>
<tr>
<td>Forecast Measures</td>
<td>Supply Chain Planning Forecast Measures</td>
<td>ScpForecastMeasureImportTemplate. xlsm</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Note:</strong> This template has been superseded by the generic template ScpMeasuresImportTemplate. xlsm but will continue to be supported. Future enhancements will be made only to the generic measures template.</td>
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<td>Fiscal Calendars</td>
<td>Supply Chain Planning Fiscal Calendars</td>
<td>ScpFiscalCalendarImportTemplate. xlsm</td>
</tr>
<tr>
<td>Forecasts</td>
<td>Supply Chain Planning External Forecasts</td>
<td>ScpExternalForecastImportTemplate. xlsm</td>
</tr>
<tr>
<td>Safety Stock Levels</td>
<td>Supply Chain Planning Safety Stock Levels</td>
<td>ScpSafetyStockLevelImportTemplate. xlsm</td>
</tr>
<tr>
<td>Supplier Capacity</td>
<td>Supply Chain Planning Approved Supplier Capacity</td>
<td>ScpApprovedSupplierCapacityImportTemplate. xlsm</td>
</tr>
<tr>
<td>Planned Order Supplies</td>
<td>Supply Chain Planning Planned Order Supply</td>
<td>ScpPlannedOrderSupplyImportTemplate. xlsm</td>
</tr>
<tr>
<td>Sourcing Rule and Assignments</td>
<td>Supply Chain Planning Sourcing Rules</td>
<td>ScpSourcingImportTemplate. xlsm</td>
</tr>
<tr>
<td>Cross-Reference Mapping Information</td>
<td>Supply Chain Planning Cross-Reference Data</td>
<td>ScpCrossReferenceDataImportTemplate. xlsm</td>
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</table>

**Collect Data from External Source - Version Others**

The following table lists the collections entities that can be loaded into the planning data repository from an external source, where the version is Others. The Collection Entity column provides the name of the entities for which you can collect the data. The XLSM File Name column provides the template name that you will download for the respective collection entity. Download the XLSM template from the File-Based Data Import for Oracle Supply Chain Management Cloud guide (FBDI guide). The Link in Data Import Guide column provides the name of the topic in the FBDI guide from where you will download the template. For example, to collect data for the Items and Item Costs collection entities, refer to the Item Cost Import topic in the FBDI guide.
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<th>Collections Entity</th>
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<td>Customer Specific Item Relationships</td>
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<td>ScpItemSubstituteImportTemplate. xlsm</td>
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<td>Supply Chain Planning Planners</td>
<td>ScpPlannersImportTemplate. xlsm</td>
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<td>Organizations (Warehouses) and Organization Site (Including Organization Site - Internal Location Mapping)</td>
<td>Supply Chain Planning Organizations</td>
<td>ScpOrganizationImportTemplate. xlsm</td>
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<tr>
<td>Subinventories</td>
<td>Supply Chain Planning Subinventories</td>
<td>ScpSubInventoryImportTemplate. xlsm</td>
</tr>
<tr>
<td>Suppliers and Supplier Sites</td>
<td>Supply Chain Planning Suppliers</td>
<td>ScpPlanningSupplierImportTemplate. xlsm</td>
</tr>
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<td>Item Suppliers</td>
<td>Supply Chain Planning Approved Supplier List</td>
<td>ScpApprovedSupplierListImportTemplate. xlsm</td>
</tr>
<tr>
<td>Interlocation Shipping Networks</td>
<td>Supply Chain Planning Interlocation Shipping Methods</td>
<td>ScpInterLocationShipMethodsImportTemplate. xlsm</td>
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<td>Currencies, Currency Conversion Types, and Currency Conversion Rates</td>
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<td>ScpCurrencyImportTemplate. xlsm</td>
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<td>Units of Measure, Units of Measure Conversions, and Units of Measure Class Conversions</td>
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<tr>
<td>Calendars, Calendar Exceptions, Calendar Shifts, Week Start Dates, Period Start Dates, and Calendar Shift Workday Pattern</td>
<td>Supply Chain Planning Calendars</td>
<td>ScpCalendarImportTemplate. xlsm</td>
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<td>Calendar Associations</td>
<td>Supply Chain Planning Calendar Assignments</td>
<td>ScpCalendarAssignmentsImportTemplate. xlsm</td>
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<tr>
<td>Demand Classes</td>
<td>Supply Chain Planning Demand Classes</td>
<td>ScpDemandClassImportTemplate. xlsm</td>
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<tr>
<td>Ship Mode of Transport, Ship Class of Service, and Carrier</td>
<td>Supply Chain Planning Carriers</td>
<td>ScpCarrierImportTemplate. xlsm</td>
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<tr>
<td>Allocation Assignments and Allocation Rules</td>
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<td>ScpPlanningAllocationRulesImportTemplate. xlsm</td>
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<td>Collections Entity</td>
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<td>XLSM File Name</td>
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<tr>
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<td>ScpATPRulesImportTemplate.xlsm</td>
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<td>Supply Update Rule</td>
<td>Supply Chain Planning Real Time Supply Updates</td>
<td>ScpRealTimeSupplyUpdatesImportTemplate.xlsm</td>
</tr>
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<td>Freight Terms, FOB Points, Invoicing and Accounting Rules, Shipment Priorities, Payment Terms, Return Reason, Tax Classification Code, Tax Exemption Reason, Sales Credit Type, Activity Type, Document Categories, Payment Methods, and Receipt Methods</td>
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<td>ScpOrderOrchestrationImportTemplate.xlsm</td>
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<tr>
<td>Measures</td>
<td>Supply Chain Planning Measures</td>
<td>ScpMeasuresImportTemplate.xlsm</td>
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<tr>
<td>Booking History</td>
<td>Supply Chain Planning Bookings History</td>
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<td>Option Booking History</td>
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<td>Shipment History</td>
<td>Supply Chain Planning Shipments History</td>
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<th>Collections Entity</th>
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<th>XLSM File Name</th>
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<td>XLSM File Name</td>
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<td>Price Lists</td>
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<td>ScpPriceListImportTemplate.xlsm</td>
</tr>
<tr>
<td>Causal Factors</td>
<td>Supply Chain Planning Causal Factors</td>
<td>ScpCausalFactorsImportTemplate.xlsm</td>
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<td>Causal Factors</td>
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<td>ScpFiscalCalendarImportTemplate.xlsm</td>
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<td>Forecasts</td>
<td>Supply Chain Planning External Forecast</td>
<td>ScpExternalForecastImportTemplate.xlsm</td>
</tr>
<tr>
<td>User-Defined Hierarchies</td>
<td>Supply Chain Planning User-Defined Hierarchies</td>
<td>ScpUser-DefinedHierarchyImportTemplate.xlsm</td>
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<td>ScpWorkOrderSuppliesImportTemplate. xlsm</td>
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<td>ScpWIPComponentDemandsImportTemplate. xlsm</td>
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<td>Work Order Resource Requirements</td>
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<td>ScpPlannedOrderSupplyImportTemplate. xlsm</td>
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<td>Supply Chain Planning Sourcing Rules</td>
<td>ScpSourcingImportTemplate. xlsm</td>
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<td>Cross Reference Mapping Information</td>
<td>Supply Chain Planning Cross-Reference Data</td>
<td>ScpCrossReferenceDataImportTemplate. xlsm</td>
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### Collect Data from External Source - Version External

The following table lists the collections entities that can be loaded into the planning data repository from an external source, where the version is External. The Collection Entity column provides the name of the entities for which you can collect the data. The XLSM File Name column provides the template name that you will download for the respective collection entity. Download the XLSM template from the File-Based Data Import for Oracle Supply Chain Management Cloud guide. The Link in Data Import Guide column provides the name of the topic in the File-Based Data Import for Oracle Supply Chain Management Cloud guide (FBDI guide) from where you will download the template. For example, to collect data for the Items and Item Costs collection entities, refer to the Item Cost Import topic in the File-Based Data Import for Oracle Supply Chain Management Cloud guide. All the planning-related entity names are prefixed with Supply Chain Planning in the FBDI guide.

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<td>XLSM File Name</td>
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<tr>
<td>Organizations and Organization Sites</td>
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<tr>
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<td>Currencies and Currency Conversions</td>
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<td>Units of Measure, Units of Measure Conversions, and Units of Measure Class Conversions</td>
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<td>GOP Supply Update Rules</td>
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<td>Document Categories, Payment Methods, and Receipt Methods</td>
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<td>Cross Reference Mapping Information</td>
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<td>Safety Stock Levels</td>
<td>Supply Chain Planning Safety Stock Levels</td>
<td>ScpSafetyStockLevelImportTemplate.xlsm</td>
</tr>
<tr>
<td>Supply Reservations to Sales Orders</td>
<td>Supply Chain Planning Reservations</td>
<td>ScpReservationImportTemplate.xlsm</td>
</tr>
</tbody>
</table>

**Note:** This template has been superseded by the generic template `ScpMeasuresImportTemplate.xlsm` but will continue to be supported. Future enhancements will be made only to the generic measures template.
<table>
<thead>
<tr>
<th>Collection Entities</th>
<th>Link in FBDI Guide</th>
<th>XLSM File Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>On Hand</td>
<td>Supply Chain Planning Supply On Hand</td>
<td>ScpOnhandImportTemplate. xlsm</td>
</tr>
<tr>
<td>Purchase Orders, Purchase Requisitions, PO in Receiving, In Transits</td>
<td>Supply Chain Planning Purchase Order Requisitions</td>
<td>ScpPurchaseOrderRequisitionImportTemplate. xlsm</td>
</tr>
<tr>
<td>Transfer Orders (including expense type transfers)</td>
<td>Supply Chain Planning Transfer Orders</td>
<td>ScpTransferOrderImportTemplate. xlsm</td>
</tr>
<tr>
<td>Supplier Capacity</td>
<td>Supply Chain Planning Approved Supplier Capacity</td>
<td>ScpApprovedSupplierCapacityImportTemplate. xlsm</td>
</tr>
<tr>
<td>Resources, Resource Shifts</td>
<td>Supply Chain Planning Resources</td>
<td>ScpResourceImportTemplate. xlsm</td>
</tr>
<tr>
<td>Resource Availability</td>
<td>Supply Chain Planning Resource Availability</td>
<td>ScpResourceAvailabilityImportTemplate. xlsm</td>
</tr>
<tr>
<td>Work Definition (including mapping between Item Structures and Work Definitions), Work Definition Operations, Work Definition Operation Resources</td>
<td>Supply Chain Planning Routings</td>
<td>ScpRoutingsImportTemplate. xlsm</td>
</tr>
<tr>
<td>Work Order Supply</td>
<td>Supply Chain Planning Work Order Supplies</td>
<td>ScpWorkOrderSuppliesImportTemplate. xlsm</td>
</tr>
<tr>
<td>Work Order Material Requirements</td>
<td>Supply Chain Planning Work Order Component Demands</td>
<td>ScpWIPComponentDemandsImportTemplate. xlsm</td>
</tr>
<tr>
<td>Work Order Resource Requirements</td>
<td>Supply Chain Planning Work Order Operation Resources</td>
<td>ScpWIPOperationResourceImportTemplate. xlsm</td>
</tr>
<tr>
<td>Planned Order Supplies</td>
<td>Supply Chain Planning Planned Order Supply</td>
<td>ScpPlannedOrderSupplyImportTemplate. xlsm</td>
</tr>
<tr>
<td>Sourcing Rule and Assignments</td>
<td>Supply Chain Planning Sourcing Rules</td>
<td>ScpSourcingImportTemplate. xlsm</td>
</tr>
<tr>
<td>Key Customer Options</td>
<td>Supply Chain Planning Key Customer Options</td>
<td>ScpKeyCustomerOptionsImportTemplate. xlsm</td>
</tr>
</tbody>
</table>
Run the Load Planning Data from Files Process

To load planning data from files, first you must prepare the data you want to load. To prepare the data, download the relevant XLSM template, update the XLSM template with required data, and create the necessary CSV files for upload. This procedure explains how to load planning data from files after you have prepared the data and created CSV files.

1. From the Navigator, use the File Import and Export page to upload the previously prepared and zipped CSV files to the Universal Content Manager. Use the account scm/planningDataLoader/Import to upload the zipped file.

   **Note:** For more information about uploading files to the Universal Content Manager server, see the following section in the Oracle SCM Cloud Implementing Common Features for Oracle SCM Cloud guide: External Integration chapter, External Data Integration Services for Oracle Cloud section.

2. From one of the Supply Chain Planning work areas or Setup and Maintenance work area, Supply Chain Planning offering, select the Load Planning Data from Files task.

3. Complete the following parameters on the Load Planning Data from Files page:
   a. Select the source system.
   b. Select Collection Type: Net change or Target.
   c. Select the .zip file you previously imported into the Universal Content Manager.

4. Click Submit. Make a note of the process ID. You will need this process ID to review the status of the process.

Verify Collection Processes

Verify the Load Planning Data from Files Process

Perform the following steps to verify the process status of the uploaded file and review log file for any errors or warnings.

1. In the Navigator, click Scheduled Processes.
2. In the search area, enter the process ID you noted when you submitted during the Load Planning Data from Files process. Click Search.
3. Monitor the process to verify completion.
   - If the process completes with warnings, select the request that shows the warning status and click the View Log button to review the details.
4. For the rows with errors, resolve the issues found in the log file, and then upload the CSV file again. To load only the revised rows, use the Net Change option.

Review Data in the Planning Data Repository

You can review the data collected or loaded into the planning data repository using two different options. The option you use depends on which data collection entities you want to review.
To review the data collected or loaded into the planning data repository, use one of the following options:

- Review data using the Plan Inputs page layout
- Review data using the Maintain Supply Network Model page

To review the following entities, use the Maintain Supply Network Model page:

- Organizations
- Customers
- Suppliers
- Carriers
- Interlocation Shipping Networks

To review data that is not part of the supply network model, use the Plan Inputs page layout. You can view the following data in the Plan Inputs page layout:

- Supply data
- Demand data

You can view Carriers and Suppliers using either option.

**Review Data Using the Plan Inputs Page Layout**

Perform the following steps to review the planning data that you loaded.

1. In the Navigator, click **Plan Inputs**.
2. From the Plans menu, right-click **Plan Inputs** and click **Open**.

   ![Plan Inputs Page Layout](image)

   **Tip:** You can set the preview pane to Full Pane for viewing your data in full pane. Click **Change** and select **Full Pane**.

3. On the Plan Inputs page, click **Open**, and click **Full Pane**.
4. On the Open Table, Graph, or Tile Set page, search for the table name.
5. Enter the criteria for the data you want to verify and click **Search**.
6. Review the data in the Search Results table.

**Review Data Using the Maintain Supply Network Model Page**

Perform the following steps to review the planning data using the Maintain Supply Network Model page.

1. In the Navigator, click **Plan Inputs**.
2. From the Tasks menu, click **Maintain Supply Network Model**.
3. Enter the criteria for the data you want to verify and click Search.
4. Review the data in the Search Results table.

Aggregate Customer Data

How You Aggregate Customer Data

Use the key customer data options collections template to identify key customers. The data for these customers will be visible. For each Zone, all non-key customers' data will be aggregated to a member named All Other. By aggregating the planning data for non-key customers, you can focus your analysis on the key customers. You use the ScpKeyCustomerOptionsImportTemplate.xlsm to identify the key customers; the rest of the customers' data will be aggregated under an All Other member.

The data that are not identified in the upload template are aggregated to an all other member for each zone. You can view the key customers and the All Other member containing the aggregated non-key customer data when you analyze the forecasts and other data.

Identifying key customers and aggregating non-key customer data helps you to do the following:

- Organize key customer data that are required for planning
- Save time by collecting only the required data from Oracle Supply Chain Management Cloud
- Build a plan specifically for your key customers

How can I reset the key customer aggregated data for a plan?

After you make changes to the aggregation level values in the ScpKeyCustomerOptionsImportTemplate.xlsm file, you must upload the file and run the plan again.

To reset the key customer aggregated data for a plan, do the following:

1. Review the ScpKeyCustomerOptionsImportTemplate.xlsm file.
2. Update the Aggregation Level values for all of the Level Name values (for example, Customer) and upload the CSV file.
3. From your Supply Chain Planning work area, open the plan and enable the Aggregate non-key customer data to All Other level member check box. Run the plan again.

Considerations for Collecting Key Customer Information

Use the ScpKeyCustomerOptionsImportTemplate.xlsm file to identify the key customers for which nonaggregated data must be made available. For non-key customers, the aggregation level that you define in the import template determines whether the data is retained or aggregated. You can differentiate between key customers and non-key customers and use the aggregated key customer data to build a plan specifically for your key customers.

Note: For details regarding the ScpKeyCustomerOptionsImportTemplate.xlsm file, refer to the File-Based Data Import for Oracle Supply Chain Management Cloud guide. This guide is one of the guides in the Oracle Help Center for Oracle Supply Chain Management Cloud. Use the Books link for a list of the guides by category, and look for the Development category.
In the ScpKeyCustomerOptionsImportTemplate.xlsm file template:

1. Define your key customers on the KeyCusOptnHeader tab. Enter the name of a valid customer hierarchy in the Hierarchy Name column.
2. Next, enter the level of that hierarchy in the Level Name column. All customers in this level are identified as key customers.
3. To have only certain customers identified as key customers, enter the specific customer names on the KeyCusOptnMembers detail tab.
4. Set the aggregation level values for both key and non-key customers. Use the settings in the template to set the data to different aggregation levels, such as 1, 2, or 3.
5. Upload the template.

Ignore Aggregate by Zone

There are two Customer hierarchies--Customer and Customer Zone--where the lowest level of each hierarchy is Customer Site. If you don't have any key customers, leave the Hierarchy Name and Hierarchy Level columns blank on the KeyCusOptnHeader tab. All customers not named in the template (non-key customers) are aggregated into an All Other member for the hierarchy.

The upload also creates All Other Zone members for the non-key customers in the Customer Zone hierarchy. If you don't want to aggregate by zone, enter #ignore_zone in the Hierarchy Name column in the KeyCusOptnHeader.csv and leave the Level Name column blank.

Aggregation Levels

The aggregation levels are listed in the following table.

<table>
<thead>
<tr>
<th>Aggregation Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retain all customer sites, and aggregate non-key customer sites. In addition to key customer data being available, non-key customer data is retained for plans that require data that is not aggregated. Aggregated customer data is available for plans that require aggregated non-key customer data.</td>
</tr>
<tr>
<td>2</td>
<td>Aggregate non-key customer sites. Customers that are not identified as key customers are aggregated to an All Other site by zone. However, if the Hierarchy Name and Level Name columns are blank, all customers are identified as non-key customers and aggregated to an All Other site by zone. This means that there are no key customers.</td>
</tr>
<tr>
<td>3</td>
<td>No aggregation of customer sites. All data is available at customer site level.</td>
</tr>
</tbody>
</table>

To remove the key customer designation for previously-loaded customers, use Aggregation Level 3. This enables data for all customers to be made available at the lowest level. No customers are marked as key customers.

If you select the aggregation level 3, the following happens:

- No aggregation is done. All data is at the customer site level only.
- If option 2 or 3 was used in previous collection runs, all non-key customer by zone members and data are deleted.
- Plans using the Key Customer feature become invalid and you have to run them again.
The KeyCusOptnMembers detail tab is optional. Use this tab to identify specific customers as key customers. The Hierarchy Name and Level Name column entries must be the same as the information entered on the KeyCusOptnHeader tab. Enter valid level member names in the Level Member Name column. These members are the only customers that will be identified as key customers.

- If the KeyCusOptnMembers detail tab is empty, all child members of the hierarchy level chosen in the Header tab are flagged as key customers.
- If the KeyCusOptnMembers detail tab is not empty, only the listed members are identified as key customers.

The members must be children of the hierarchy level named on the Header tab.

When you create a plan, there is an option in the Plan Options dialog box that determines what level of customer aggregation is used for the plan:

- Key customer data is available and non-key customer data is aggregated to a level member named All Other.
- No customer data is aggregated for the plan if the option is deselected.

Load Aggregated Customer Data from Oracle E-Business Suite

This topic explains the procedure you follow to load aggregated customer data from an Oracle E-Business Suite source system into your Oracle Supply Chain Planning Cloud destination system.

The procedure is comprised of the following steps:

1. Extract data from your Oracle E-Business Suite source system.
2. Prepare the Supply Chain Planning Key Customer Options file if you have defined key customers in your Oracle E-Business Suite source system.
3. Add the files to your desktop or local hard drive.
4. Import data into your Oracle Supply Chain Planning Cloud destination system.

Additional details for each step are provided in this topic.

Prerequisites

To perform the process required to extract data from your Oracle E-Business Suite source system, you must have an administrator role (Advanced Planning Administrator or Advanced Supply Chain Planner).

Your source system must be set up as one of the Trading Community Source Systems for Oracle Supply Chain Planning Cloud.

You can perform the steps to import data into your Oracle Supply Chain Planning Cloud destination system from one of the Supply Chain Planning work areas. You do not need an administrator role to perform these steps.

Extract Data

To extract the data from your Oracle E-Business Suite source system, run the Extract Data for Oracle Supply Chain Planning Cloud process.

Consider the following conditions for the MSD_DEM_CUSTOMER attribute when you run the process:

- If the MSD_DEM_CUSTOMER_ATTRIBUTE is set to null, then all sites are extracted.
- If the MSD_DEM_CUSTOMER_ATTRIBUTE is set to none, then all records are aggregated to Default Customer Site.
- If the MSD_DEM_CUSTOMER_ATTRIBUTE is set to a valid customer attribute, then all sites are extracted.
The extracted data is stored in a file in the zipped file format in the middle tier of your source system.

**Prepare the Key Customer Options File**

If you have defined key customers in your Oracle E-Business Suite source system, then perform these steps to prepare the Supply Chain Planning Key Customer Option file:

1. Download the template for file-based data loads for the Supply Chain Planning Key Customer Options object.
2. Add your data to the file.
3. Generate the CSV file.

For details on preparing files for loading planning data, refer to these help topics: Loading Planning Data from Files: Overview and Creating CSV Files Used to Load Planning Data: Procedure.

**Add the Files to Your Desktop or Local Hard Drive**

Locate the extracted Zip file on your Oracle E-Business Suite middle tier, and download or transfer the file to your desktop or local hard drive.

If you have defined key customers in the Oracle E-Business Suites source system, then include the Key Customer Options file in the Zip file.

**Import Data into Your Oracle Supply Chain Planning Cloud Destination System**

To import the data into your Oracle Supply Chain Planning Cloud destination system, perform these steps:

1. From the Navigator, click **File Import and Export**.
2. On the File Import and Export page, perform the upload action using these values:
   - File: The file you created
   - Account: scm/planning DataLoader/Import
3. From one of the Supply Chain Planning work areas, perform the Manage Planning Source Systems task to check if your source system is already created. If your source system is not already created, then create it with the following values:
   - Version: External.
   - Code: Must be the same as the one used for your Oracle E-Business Suite source system.
4. From a Supply Chain Planning work area, perform the Load Planning Data from Files task.
4 Manage Supply Network Model

How You Maintain Your Supply Network Model

Use the Maintain Supply Network Model page to view your collected data that includes details of organization, customers, suppliers, carriers, and interlocation shipping networks. To access the Maintain Network Model page, navigate to a Supply Chain Planning work area. Click the Tasks panel tab and then select the **Maintain Supply Network Model** link.

You use organizations to represent your business facilities or functions. Typically, if your business has a single physical facility that performs two different functions, then you model it as two organizations. For example, you have one facility that’s a manufacturing plant and a distribution center. You can model them as two separate organizations. Additionally, if your business has one function located in two separate physical facilities, you can model those as one organization. If you modeled your facilities as one organization, you can create separate subinventories to represent inventory for each facility.

Review the Collected Data

Based on your search results, use the information on the Organization tab to do the following:

- Review organizations, including the time zones associated with the organizations, for all source systems.
- Create customer and supplier association to organizations. This is used when creating the buy-sell transfers.
- Select the drop ship validation organization. For each source system, you can select only one organization as the drop shop validation organization. You can also assign a calendar to a drop shop validation organization.
- Set past due parameters for each organization, which include:
  - Past due forecast days
  - Past due sales order days
  - Past due supply days

Use the Customer and Supplier tabs to review collected data and assign time zones to customer sites and supplier sites. If the customer site or supplier site doesn’t have an associated time zone, then the customer site or supplier site is assumed to be in the same time zone as the organization that’s associated to the demand or supply.

Use the Carrier and Interlocation Shipping Locations tabs to review collected data on carriers, shipping methods, and transit times.

Buy and Sell Transfers

You can conduct material transfers between two organizations in a single Oracle Fusion source system by using the purchase order and sales order documents. The sales order at the source organization is used to ship the transfer. The purchase order at the destination organization is used to receive the transfer.

In the supply network model for the purchase order supply at the receiving organization:

- Define the supplier to source organization relationship and for the sales order demand at the shipping organization.
• Define the customer to destination organization relationship.

To model an organization as a supplier, update the Supplier and Supplier Site columns of the associated organization.

To model an organization as a customer, update Customer and Customer Site columns of the associated organization.

Forecast and Consume Internal Orders

To forecast and consume internal orders, assign a customer and customer site to the organization that’s the destination of the transfers. Use a customer name that makes sense for the destination organization, such as M1 Transfers. After you assign a customer and customer site on the Organizations tab, select the Use Customer and Customer Site for Interorganization Transfers check box for the organization.

Note: To complete the setup to forecast and consume internal orders, you must also do the following:
• On the Collect Planning Data page, Parameters tab, Demand Planning Data subtab, select the Collect historical transfer orders check box.
• In the plan options for your plan, select the Include transfer orders check box in the Demand: Advanced Options dialog box. This check box is only available from a Demand Management, Planning Central, or Demand and Supply Planning work area.

Related Topics
• Overview of Data Collections for Supply Chain Planning
• How You Collect Different Data Types for Supply Chain Planning
• How You Load Planning Data from Files
• Set Up Forecast Consumption for Transfer Orders

How You Define the Approved Supplier List

An approved supplier list (ASL) is a repository of information that links items to the suppliers and supplier sites that provide them to either a specific ship-to-organization or the entire enterprise. An ASL can be global or specific to an organization; however, supply planning only recognizes global ASLs. The planning process collects ASLs from Oracle Fusion Procurement to determine the supplier and supplier sites for items.

Define ASL attributes in two different ways to use in supply planning. You can define some attributes in Oracle Fusion Procurement and then upload a CSV file that defines the attributes you want supply planning to use.

Define the following item-to-supplier relationships and order modifiers in Oracle Fusion Procurement:
• Supplier
• Supplier site
• Minimum order quantity
• Fixed lot multiple

To upload additional attributes for supply planning to use, you must create and collect the ASL from purchasing. You can then use the CSV file upload to define additional attributes such as the following:
• Item-supplier lead time
• Supplier capacity calendar
• Daily supplier capacity
Related Topics

• Supplier Capacity Options

Assignment Sets, Sourcing Rules, and Bills of Distribution

You use assignment sets in a Supply Chain Planning work area to link sourcing rules and bills of distribution to items. Using sourcing rules, bills of distribution, and assignment sets together, you can specify how material is supplied, manufactured, and transferred across a supply chain.

Note: This topic is applicable to only the Planning Central, Sales and Operations Planning, Supply Planning, and Demand and Supply Planning work areas.

When you create sourcing rules and bills of distribution, you create descriptions of the means by which you can replenish items. However, item numbers are not specified anywhere on the definition forms, so a defined sourcing rule or bill of distribution can later be assigned to any items or groups of items. Use assignment sets to associate specific item numbers, categories, or organizations with the sourcing rules and bills of distribution.

You must use sourcing to describe the supply chain to the planning process. Use the following three structures to do so:

• Sourcing rules
• Bills of distribution
• Assignment sets

Sourcing Rules

Sourcing rules and bills of distribution determine the movement of material between organizations. These organizations include supplier, manufacturing, and distribution facilities. You can navigate to a Supply Chain Planning work area and click Manage Sourcing Rules from the Tasks drawer to create or search for an existing sourcing rule.

The three types of sources are:

• Transfer From: Interorganization shipping functionality accomplishes the transfer between internal organizations. Enter the source organization in the Organization column.
• Make At: The item is manufactured at this internal organization. Enter the manufacturing organization in the Organization column.
• Buy From: Purchase the item from an external enterprise. Data entry in the Supplier and Supplier Site columns are enabled, and the Organization column is disabled.

Allocation and Rank: The total allocation percentage for all sources within a rank must add up to 100 percent. The sources with the highest rank (lowest numeric value) get the highest priority in allocations. Planning Central only considers sources of rank one.

Bill of Distribution

When material flows through three or more organizations, bills of distribution describe supply chain links more efficiently than sourcing rules. However, any relationship that can be described by bills of distribution can also be described by a set of sourcing rules. Typically, most users use sourcing rules rather than bills of distribution. You can
navigate to a Supply Chain Planning work area and click Manage Bills of Distribution from the Tasks drawer to create or search for existing bills of distribution.

**Note:** Despite the name, bills of distribution do not describe an outward bound or push type of sourcing relationship. Both sourcing rules and bills of distribution are used only to pull material from sources to destinations.

### Assignment Sets

You use assignment sets to link sourcing rules and bills of distribution to items. In other words, you use assignment sets to link sourcing rules, items and supply nodes. The assignment set creates the sourcing and transfer links between organizations for each item involved in a supply chain plan. Alternative supply chains can be modeled by creating alternative assignment sets. You can navigate to a Supply Chain Planning work area and click Manage Assignment Sets from the Tasks drawer to create or search for existing assignment sets.

### Sourcing Assignment Hierarchy

The planning process uses a sourcing assignment hierarchy to determine the actual source of a specific item. You can assign replenishment sources at the following levels. Specific sourcing assignments override general assignment levels.

The following table lists the supply sourcing hierarchy.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Item or Category</th>
<th>Applies to</th>
</tr>
</thead>
</table>
| 1    | Item - Organization       | 1. Sourcing rule  
                               | 2. Item-organization attributes (Make or Buy)  |
| 2    | Category - Organization   | N/A                                             |
| 3    | Item                      | 1. Bill of distribution  
                               | 2. Global sourcing rule     |
| 4    | Category                  | 1. Bill of distribution  
                               | 2. Global sourcing rule     |
| 5    | Organization              | 1. Bill of distribution  
                               | 2. Global sourcing rule     
                               | 3. Item-master attributes (Make or Buy) |
| 6    | Global                    | 1. Bill of distribution  
                               | 2. Global sourcing rule     |

**Caution:** To use category in the assignment set, you must set the profile option catalog for sourcing assignments to select the catalog that is used for sourcing. Typically, the planning catalog is used. However, any collected catalog can be selected in the profile option. If the profile option is blank, then category is not available in the assignment hierarchy.
When you source supplies for sales orders and forecasts (independent demands), order promising and planning use the more detailed hierarchy. This hierarchy includes demand class, customer, and customer site which are dimensions of independent demand.

The following table lists the demand sourcing hierarchy.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Item or Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Item - Customer / customer site</td>
</tr>
<tr>
<td>2</td>
<td>Item - Customer</td>
</tr>
<tr>
<td>3</td>
<td>Item - Demand Class</td>
</tr>
<tr>
<td>4</td>
<td>Item - Region</td>
</tr>
<tr>
<td>5</td>
<td>Category - Customer / customer site</td>
</tr>
<tr>
<td>6</td>
<td>Category - Customer</td>
</tr>
<tr>
<td>7</td>
<td>Category - Demand Class</td>
</tr>
<tr>
<td>8</td>
<td>Item</td>
</tr>
<tr>
<td>9</td>
<td>Category - Region</td>
</tr>
<tr>
<td>10</td>
<td>Category</td>
</tr>
<tr>
<td>11</td>
<td>Customer / customer site</td>
</tr>
<tr>
<td>12</td>
<td>Customer</td>
</tr>
<tr>
<td>13</td>
<td>Demand Class</td>
</tr>
<tr>
<td>14</td>
<td>Region</td>
</tr>
<tr>
<td>15</td>
<td>Global</td>
</tr>
</tbody>
</table>

Using the demand sourcing hierarchy, if a demand line includes a value for demand class, then if no sourcing rule exists for Item - Customer / customer site or Item - Customer, but a rule exists for Item-Demand Class, then that rule is used to determine supply sources for the demand line.
When using the sourcing hierarchy, if two rules conflict, the more granular rule is used. To verify which source is used for an assignment set, from within the set, click the **View Sourcing** button after entering the following required parameters:

- Assignment set
- Organization
- Item
- Date

The dialog box displays which assignments apply to the item-organization-date that you selected. If multiple rules apply, then the Active Rule is marked in the form.

### Specify Catalogs for Assignment Sets

A catalog is a collection of categories used to classify items that you can organize into a hierarchy. A catalog can have a flat or single-level structure of categories or you can have a hierarchical structure of categories.

When creating assignment sets, you must specify a catalog for each assignment set. You associate an assignment set with a catalog to:

- Use the categories associated to that catalog in your assignment set.
- Link the sourcing assignments to the categories associated with the catalog.

If you do not specify a catalog for an assignment set, the assignment set uses the Catalog for Sourcing Assignments (MSC_SRC_ASSIGNMENT_CATALOG) profile option as the default catalog.

To create an assignment set and specify a catalog, use the Manage Assignment Sets task in one of the Supply Chain Planning work areas.

**Note:** Assignment sets are not applicable to the Demand Management work area.

### Item Attributes and Order Modifiers for Supply Planning

Items represent the material that you use in manufacturing and distribution processes and store in inventory. Item attributes specify properties of each item. You set the item attributes for supply planning through the Product Information Management work area.

Use these steps to set item organization attributes for supply planning:

1. Navigate to the Product Information Management work area and open the **Manage Items** task from the Tasks drawer.
2. Search for your items.
3. Select an item and edit attributes on the specification tab. You can locate the Planning attributes under the planning section.

This table lists the attributes related to supply planning.
<table>
<thead>
<tr>
<th><strong>Item Attribute</strong></th>
<th><strong>Item Structure</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Overview</td>
<td>Unit of Measure</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>Structure Item Type</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>Base Model</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>Autocreated Configuration</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>Assemble to Order</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>Build in WIP</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>Supply Type</td>
</tr>
<tr>
<td>Inventory</td>
<td>Inventory Item</td>
</tr>
<tr>
<td>Inventory</td>
<td>Stockable</td>
</tr>
<tr>
<td>Inventory</td>
<td>Transactable</td>
</tr>
<tr>
<td>Order Management</td>
<td>Customer Orders Enabled</td>
</tr>
<tr>
<td>Order Management</td>
<td>Transfer Orders Enabled</td>
</tr>
<tr>
<td>Planning</td>
<td>Make or Buy</td>
</tr>
<tr>
<td>Planning</td>
<td>Safety Stock Method</td>
</tr>
<tr>
<td>Planning</td>
<td>Planner Code</td>
</tr>
<tr>
<td>Planning</td>
<td>Planning Method</td>
</tr>
<tr>
<td>Planning</td>
<td>Forecast Control</td>
</tr>
<tr>
<td>Planning</td>
<td>Time Fences: Demand</td>
</tr>
<tr>
<td>Planning</td>
<td>Time Fences: Release</td>
</tr>
<tr>
<td>Item Attribute</td>
<td>Item Structure</td>
</tr>
<tr>
<td>----------------</td>
<td>-------------------------------------</td>
</tr>
<tr>
<td>Planning</td>
<td>Time Fences: Planning</td>
</tr>
<tr>
<td>Planning</td>
<td>Cost</td>
</tr>
<tr>
<td>Planning</td>
<td>Carrying Percentage</td>
</tr>
<tr>
<td>Planning</td>
<td>Shrinkage Rate</td>
</tr>
<tr>
<td>Planning</td>
<td>Acceptable Early Days</td>
</tr>
<tr>
<td>Planning</td>
<td>Lead Times: Processing</td>
</tr>
<tr>
<td>Planning</td>
<td>Lead Times: Preprocessing</td>
</tr>
<tr>
<td>Planning</td>
<td>Lead Times: Postprocessing</td>
</tr>
<tr>
<td>Planning</td>
<td>Lead Times: Fixed</td>
</tr>
<tr>
<td>Planning</td>
<td>Lead Times: Variable</td>
</tr>
<tr>
<td>Planning</td>
<td>Minimum Order Quantity</td>
</tr>
<tr>
<td>Planning</td>
<td>Maximum Order Quantity</td>
</tr>
<tr>
<td>Planning</td>
<td>Fixed Order Quantity</td>
</tr>
<tr>
<td>Planning</td>
<td>Fixed Lot Multiplier</td>
</tr>
<tr>
<td>Planning</td>
<td>Fixed Days Supply</td>
</tr>
<tr>
<td>Planning</td>
<td>Rounding</td>
</tr>
<tr>
<td>Purchasing</td>
<td>Purchasable</td>
</tr>
<tr>
<td>Purchasing</td>
<td>Approved Supplier List</td>
</tr>
</tbody>
</table>

You can use these attributes for specific purposes:
- Make or Buy: This attribute is used by default if no sourcing rule is present.
• Planning Method: Use either MRP planned or MPS planned as the planning method.
• Time Fences: All are used by planning.
• Buy items use the processing lead times. Make items use fixed and variable.
• Make, buy, transfer all use preprocessing lead time. Buy and transfer use post processing lead time.
• Acceptable Early Days is used if you need to reschedule existing supplies. If the supply due date is within the acceptable early days, then no reschedule out recommendation is issued.

Order Modifiers
You use order modifiers to obtain planned orders that you are more likely to use in your environment. For example, you may purchase an item from a supplier who only provides it on pallets of quantity 100. If you are short in some quantity, say 72, you can set the planned order quantity to 100 instead of 72 to support your requirement. You can’t apply order modifiers to phantoms.

These are the order modifiers that you can use:

• Minimum Order Quantity
• Maximum Order Quantity
• Fixed Order Quantity
• Fixed Lot Multiplier
• Fixed Days Supply
• Rounding

Material planning uses a priority sequence (precedence) of order modifiers. It applies certain order modifiers before others and rules out certain order modifiers based on its using certain other order modifiers. The order modifier precedence is:

• Fixed Days Supply: One planned order for this item must cover all the shortages for the number of days specified in the value. For example, if the net requirements are 50 on Monday, 100 on Wednesday, 70 on Thursday, and you have set fixed days supply to five, the planning process creates one planned order, with quantity of 220 (50 + 100 + 70) and due on Monday. The period start dates are not fixed. In the example, the next period of five days would not always start on the following Monday but would start on the next day after Friday that has net requirements. You can adjust the fixed days supply value using the other order modifiers. Therefore, the next period of five days could be the following Wednesday through the second Tuesday.

• Fixed Order Quantity: You must always set the planned order quantity with this value. For example, if the net requirements are one and you have set fixed order quantity to 200, the planning process creates one planned order with quantity of 200. If set, the planning process skips to the modifier Round order quantities.

• Fixed Lot Multiplier: You must always have the planned order quantity with this value. For example, if the net requirements are 400 and you have set fixed lot multiple to 150, the planning process creates one planned order with quantity of 450.

• Minimum Order Quantity: The planned order quantity may never be less than this value. For example, if the net requirements are 100 and you have set minimum order quantity to 150, the planning process creates one planned order with quantity of 150. If set, the planning process skips to the modifier Round order quantities.

• Maximum Order Quantity: One planned order for this item may not have a quantity more than this value. For example, if the net requirements are 200 and you have set maximum order quantity to 150, the planning process creates two planned orders, one with quantity of 150 and the other with quantity of 50.

• Rounding: The planned order quantity must always be a whole number; the planning process always rounds fractional quantities up to the next highest whole number. For example, if the net requirements are 99.2 and you have selected round order quantities, the planning process creates one planned order with quantity of 100.
5 Planning Analytics

Overview of Planning Analytics

Configuring planning dimensions and hierarchies on the Configure Planning Analytics page is a key setup to use the analytics in Supply Chain Planning work areas. It has a unified dimensional hierarchy for various uses. Depending on your security privilege, you can also open the Configure Planning Analytics page from the Setup and Maintenance work area by selecting the following:

- **Offering**: Supply Chain Planning
- **Functional Area**: Supply Chain Planning Configuration
- **Task**: Configure Planning Analytics

To run plans successfully, you must complete the following Configure Planning Analytics tasks:

- Set Up Dimension Catalogs
- Set Up Measure Catalogs
- Set Up Levels and Attributes

You can use the default hierarchies for most of the dimensions.

If the default product catalog named Product is not collected, then you must select at least one product hierarchy. If a default product catalog is collected, then the predefined Product hierarchy is selected as a product hierarchy by default. You can optionally add or change the product hierarchy. You must include at least one product hierarchy when creating a dimension catalog.

On the Configure Planning Analytics page, Levels and Attributes tab, you can configure your planning table and graphs to display descriptions instead of codes for the following entities: Items, Organizations, Resource, Work Center, and Work Area.

Configure Planning Analytics

To run plans successfully, you must set up dimensions and dimension catalogs, measure catalogs, and levels and attributes. You can open the Configure Planning Analytics task from one of the Supply Chain Planning work areas. Depending on your security privilege, you can also open the Configure Planning Analytics page from the Setup and Maintenance work area.

**Note:** Default Catalog is the name of the predefined dimension catalog. It contains predefined hierarchies. Oracle recommends that you make a copy of the Default Catalog if changes are required, instead of editing the default catalog.
To configure planning analytics:

1. In the Navigator, click one of the Supply Chain Planning work areas or click the Setup and Maintenance work area.
   - If you clicked one of the Supply Chain Planning work areas, do the following:
     i. Click the Tasks panel tab.
     ii. In the Tasks panel drawer, click the **Configure Planning Analytics** link.
   - If you clicked the Setup and Maintenance work area, select the following:
     - **Offering**: Supply Chain Planning
     - **Functional Area**: Supply Chain Planning Configuration
     - **Task**: Configure Planning Analytics

2. On the Configure Planning Analytics page, Dimension Catalogs tab, do the following:
   a. Create a dimension catalog using the **Add Row** button, or duplicate the default dimension catalog using the **Duplicate** button.
   b. Specify what hierarchies to use in the dimension catalog by moving hierarchies from the Available pane to the Selected pane.
   c. Assign the dimension catalog to a plan that will use the set of hierarchies for analysis during the plan creation from Manage Plans.

3. Each Supply Chain Planning work area has a default measure catalog. Create a new measure catalog to add or remove measures.
   a. Use the **Add Row** button to create a new catalog or use the **Duplicate** button to duplicate an existing catalog.
   b. Specify the measures for the catalog by moving the measures from the Available pane to the Selected pane.
   c. Assign the measure catalog to a plan that will use the set of measures during the plan creation from Manage Plans.

   After you create and define a measure catalog, you can select the measure catalog for a plan from the Edit Plan Options page.

4. Click the Levels and Attributes tab and select the desired dimension and hierarchy.
   a. In the **Dimension** list, select a dimension.
   b. Optionally, in the **Hierarchy** list, select a hierarchy.
   c. Click the **Search** icon button.
   d. To change how the level name appears in pivot tables and graphs, select the row and enter the level name in the **Level Name to Display** field.

   **Note:** You can't edit the Level Name to Display field for the lowest level of the hierarchy.

   e. To display a particular member identifier in your tables and graphs, select a dimension (Product, Organization, or Resource) and level, and then select a value in the **Member Identifier to Display** column:
### Dimensions and Dimension Catalogs

#### How You Use Dimensions and Dimension Catalogs in Supply Chain Planning

Oracle Fusion Supply Chain Planning has hierarchy levels by which you can view, compare, and analyze demands and supplies of your products over various dimensions, such as geography and organizations. Supply Chain Planning uses a single set of dimensions and hierarchies to drive aggregation context for demand planning, supply planning, embedded analytics, and management analytics.
Supply Chain Planning provides predefined planning dimensions. Each of those dimensions has a predefined hierarchy. When you implement the Supply Chain Planning offering, you must decide which dimensions and hierarchies to use for demand and supply analysis.

Each dimension catalog has a collection of hierarchies in different dimensions that is enabled for use in the plan options. By default, all predefined hierarchies are available in Planning Analytics. You can disable certain dimensions that are not relevant for your plans. For example:

- If you are only using demand plans, then supplier, resource, and order type dimensions may not be relevant
- If you are using sales and operations plans, then the order type dimension is not relevant

The following hierarchies are predefined in Supply Chain Planning:

- Customer
- Demand Class
- Exception Type
- Order Type
- Organization
- Plan
- Product
- Resource
- Supplier
- Source
- Time

Access the Configure Planning Analytics page from a Supply Chain Planning work area. Depending on your security privilege, you can also open the Configure Planning Analytics page from the Setup and Maintenance work area.

- To access the Configure Planning Analytics page from a Supply Chain Planning work area:
  a. Click the Tasks panel tab.
  b. In the Tasks panel drawer, click the Configure Planning Analytics link
- To access the Configure Planning Analytics page from the Setup and Maintenance work area, select the following:
  o Offering: Supply Chain Planning
  o Functional Area: Supply Chain Planning Configuration
  o Task: Configure Planning Analytics

In the Dimension Catalogs tab, several hierarchies are available in various dimensions. You can specify which hierarchy to use in a particular dimension catalog. For example, you can select an organization type hierarchy, a product type hierarchy, or a customer hierarchy to use in plans for analysis. After you define a dimension catalog, you can assign it to a plan that will use the set of hierarchies for analysis.

You can select one of your dimension catalogs to be used as the default dimension catalog in plans. If you do not select a default catalog, the predefined catalog named Default Catalog is used.

Related Topics
- Why You Disable or Enable Dimensions for Supply Plan Measures
Considerations for Setting Up Dimension Catalogs

Supply Chain Planning provides predefined planning dimensions and each of those dimensions have predefined hierarchies. The predefined hierarchies are included in the default dimension catalog and are available in all plans.

Hierarchy Selections for the Product Dimension

A predefined Product hierarchy is included in the default dimension. The default Product hierarchy has three fixed levels: Item, Category 1, and Category 2. Other Product hierarchies (other item catalogs in Oracle Fusion Product Model that are collected into Supply Chain Planning work areas) can be optionally enabled as user-defined product hierarchies.

For Oracle Fusion Sales and Operations Planning, the Lifecycle Phase attribute is also included in the default dimension. By default, Oracle Fusion Product Model's planning functional area catalog is collected into the Product hierarchy. For the collection to run successfully, you must create the planning functional area catalog in Product Model with the following attributes:

- Controlled at = Master-Level (not Org-Level)
- Allow hierarchy of categories = No
- Default category must be selected
- Allow multiple item category assignments = Not selected
- Catalog Content = Items at Leaf Level

If this catalog is not set up with these attributes, the planning functional area catalog is not collected and the Product hierarchy will not be populated. This will result in the forecasting engine not being able to use the product aggregation and some of the predefined tables and graphs will not work correctly.

Hierarchy Selections for the Organization Dimension

Enterprise is the default organization hierarchy and has three fixed levels: Organization, Business Unit, and Legal Entity. This default organization is defined in Oracle Fusion HCM and you can only modify it there. Optionally, you can enable other Organization hierarchies (based on regions, one per country).

Hierarchy Selections for the Customer Dimension

The default Customer hierarchy has three fixed levels: Customer site, Customer, and Customer Class. This default customer hierarchy is defined in the trading community model and you can only modify it there.

Hierarchy Selections for the Resource Dimension

The default Resource hierarchy has four fixed levels: Resource, Work Center, Work Area, and Organization. This default resource hierarchy is defined in Oracle Fusion Manufacturing and you cannot modify it.

Hierarchy Selections for the Supplier dimension

The default Supplier hierarchy has two fixed levels: Supplier Site and Supplier.

Hierarchy Selections for the Exception Type, Order Type, and Source Dimensions

Predefined Exception Type, Order Type, and Source dimensions are included in the Default dimension catalog. Each has only a single hierarchy with a single level.
Hierarchy Selections for the Time Dimension

In the Time dimension, Gregorian calendar is the only predefined hierarchy. All other hierarchies can be optionally included as user-defined hierarchies. These include workday calendars of inventory organizations collected from Oracle Fusion Supply Chain Management and fiscal calendars from Oracle Fusion Financials.

Related Topics

- Why You Disable or Enable Dimensions for Supply Plan Measures

What's a dimension in Supply Chain Planning?

A dimension is a structure that organizes data. It categorizes data to enable you to answer business questions. Commonly used dimensions are customers, products, and time.

How can I use dimensions in Supply Chain Planning?

Supply Chain Planning applications come with predefined hierarchies in the Product dimension. These predefined hierarchies are part of the Dimension catalog structure in Oracle Fusion Product Model. Integrations with Oracle E-Business Suite and third-party systems where the product dimensions can still be maintained and uploaded for use by the Oracle Supply Chain Planning Cloud applications is supported.

What's a dimension catalog in Supply Chain Planning?

In Supply Chain Planning, a dimension catalog is a selected list of dimensions enabled for use in plans. In Supply Chain Planning, a dimension catalog is a selected list of hierarchies in different dimensions that is enabled for use in plans. The Default dimension catalog appears by default, but can be changed to another dimension catalog that has been defined.

Can I modify the default dimension catalog?

Yes, you can modify the Supply Chain Planning default dimension catalog. However, if you want to make any changes, Oracle recommends that you create a duplicate of the default dimension catalog.

Measure Catalogs

How You Use Measure Catalogs

The measure catalog is similar to the dimension catalog. Each measure catalog has a collection of measures that you can enable for use in plans in one of the Supply Chain Planning work areas. While Oracle provides predefined measures, you can also create measures in some work areas and add them to a measure catalog.
On the Configure Planning Analytics page, Measure Catalogs tab, you can create a measure catalog and add or remove measures from a measure catalog.

The predefined measure catalog is the default. When you create a new plan, the measure catalog that is used is based on the catalog check box located on the Measure Catalogs tab. For example, the catalog check box in the:

- Planning Central work area is **Planning Central Catalog**
- Sales and Operations Planning work area is **Sales and Operations Planning Catalog**
- Demand Management work area is **Demand Management Catalog**
- Supply Planning work area is **Supply Planning Catalog**

If you change the default catalog later, the plan continues to use the same measure catalog that it was created with.

**Can I modify the default measure catalog?**

No. Although you cannot modify the default measure catalog, you can create a measure catalog, modify the list of measures, and assign it to plans on the Plan Options page.

**Levels and Attributes**

**How You Use Levels and Attributes**

On the Levels and Attributes tab, you can enable certain item and organization attributes (standard fields or flexfields) to be available in Planning Analytics as filters. For example, you can enable PLANNER_CODE to use in an analysis to group metrics and measures by that particular attribute.

You can create a display name to use in the various pivot tables and graph configurations. For example, if the predefined level name is Product Category 2, you can enter a display name of Laptops. You can also configure which identifier to display in tables and graphs for selected hierarchies. For example, you can choose to display item name or item description in your tables and graphs.

**Displaying Descriptions in Tables and Graphs**

You can analyze planning data in planning tables and graphs by using the description fields of entities in hierarchies, such as items and organizations. You can use the description fields when their primary identifier is a difficult to understand alphanumeric code. You can toggle between the code and description, or display both, in planning tables and graphs for the following entities:

- Items
- Organizations
- Resources
- Work Centers
- Work Areas

**Tip:** The organization level in the Organization dimension and the organization level in the Resource dimension are separate settings. Oracle recommends that you set them to use the same identifier.
Changing a member identifier can impact the advanced criteria in tables and graphs. If you use an advanced filter criteria in a table or graph, then the criteria will be compared to the new member identifier, which can affect the search results. The change to the member identifier can result in different or no members meeting the filter criteria. For example, many names might start with AB, but no descriptions start with AB. After you make this change, you should verify that any advanced filter criteria used are still valid.

**Note:** In the Selector Tool, the member values displayed are based on what is configured in the Member Identifier to Display column on the Configure Planning Analytics page, Levels and Attributes tab. For example, for item, you can configure your tables and graphs to show item description instead of item name, which is what also appears when you are in the Selector Tool.
6 Planning Measures

Predefined Measures in Supply Chain Planning

When you use one of the Supply Chain Planning work areas, you have access to many predefined measures. To review the details of each predefined measure, use the following:

- The Manage Planning Measures task
- A spreadsheet available at My Oracle Support

The Manage Planning Measures Task

On the Manage Planning Measures page, select a measure, and then select edit. You can review the details of the measure on the Edit Measure page even if you can't make changes to the measure.

A Spreadsheet Available at My Oracle Support

Use Doc ID 2374816.1, Oracle Supply Chain Planning Cloud: List of Predefined Measures.

The List of Predefined Measures spreadsheet contains only the core measure attributes. You can use the Edit Measures page to view all the attributes associated with a particular measure.

How You Manage Planning Measures

Use the Manage Planning Measures task to review Supply Chain Planning measures. You can edit several measures, but some measures you can only view. You use the pivot table to view the data you edited at different aggregations. The results of the edits are stored based on definitions of a measure.

This topic discusses how you can perform these tasks:

- Update the definition of a measure
- Update aggregation parameters
- Update disaggregation parameters
- Edit data of a measure

Update the Definition of a Measure

To update the definition of a measure:

1. In the Navigator, click a Supply Chain Planning work area.
2. Click the Tasks panel tab.
3. In the Tasks panel, click the Manage Planning Measures link.
4. Expand a measure group and scroll manually or use the search option to find all measures that match the search criteria.
5. Select the measure that you want to modify and then click the **Edit** icon.

| **Note:** Look for a check mark next to **Allow editing** at the top of the measure definition controls to confirm that the measure is editable. |

6. Click the **Aggregation and Disaggregation** tab to view measure definitions.

   The dimensions, hierarchies, and levels at which data persists vary from measure to measure. For the dimensions with a check mark, the measure is defined on the current dimension. For these dimensions, each measure is defined on a single hierarchy as listed on the dialog box.

7. Click **Save and Close**.

**Update Aggregation Parameters**

Aggregation parameters control the way in which data of a measure is aggregated from the storage level to a table, graph, or infotile. Calculation Order enables you to chose between the following options:

- **Calculate and Aggregate**: Calculates the measure's expression at the lowest data level and then aggregate up.
- **Aggregate and Calculate**: Aggregates all measures referenced in the measure's expression and then calculate the expression.

**Update Disaggregation Parameters**

The disaggregation methodology is driven by the definitions of the disaggregation parameters. Disaggregation for definitions that include time can be different from disaggregation for definitions that do not include time. For noneditable measures there are no configuration in the disaggregation parameters.

The four different allocation methods are the following:

- **Same**: Indicates that all lower-level entries into which the data is being saved will receive the same value. Service level would be a good measure to use Same Value settings as the percentage being entered should not be allocated between different items and organizations.
- **Equal**: Spreads the edited value among the lower level entries into which data is being saved. Each entry receives an equal share of the update. This could commonly be seen on the time dimension, where data may be updated for a week or month, but there is no guidance on how it should be allocated to the common storage level of days. It is typically set to the time dimension to equal value to support equal allocation between the days.
- **Self**: Uses a measure's own pre-calculated values to allocate the data to the dimension member combinations. For example, item-organization. The weights for each combination are calculated and stored for the measure during plan run. These weights are used to allocate the data. For example, the forecasts for P1-Org1 and P2-Org1 are 40 and 60 respectively. Therefore, the weights used for allocation would be 40% for P1-Org1 and 60% for P2-Org1.
- **Measure**: Uses values of a different measure to allocate.

**Edit Data of a Measure**

To edit the data of a measure, open a table containing the measure, double-click the cell where the data is to be entered and then enter the data. In a table, editable and noneditable cells look similar. However, when you double-click a cell of an editable measure, the cell enables you to enter values.
Copy Data from One Measure to Another

In a Supply Chain Planning table, you can update the value of one measure by using values from another measure. In several cases, a measure can have other related measures that enable you to override the value of a base measure. For example, Sales Forecast is one of those measures:

- Sales Forecast: Base measure.
- Adjusted Sales Forecast: You can override what is in Sales Forecast.
- Final Sales Forecast: The planning process takes the Adjusted Sales Forecast, if there is one, or uses the Sales Forecast. The planning process uses the Final Sales Forecast, which takes into account any manual adjustments that you made.

You can specify the data source whose values you want to copy to the selected range of cells in the target measure. Using a table containing the three measures listed in our previous example, select a range of cells associated with the Adjusted Sales Forecast measure, click Actions and then select Edit. In the Edit Measures dialog box, use the Sales Forecast measure as the source measure for Adjusted Sales Forecast and increase it by 10 percent. If your Sales Forecast is 200, then Adjusted Sales Forecast now reflects 220.

For a measure to appear in the list of values for Source Measure in the Edit Measures dialog box, the measure must be included in the table. The measure must also conform to the same dimensions as the measure you are editing.

When editing a measure's value at an aggregate level, the value is allocated down to the lowest level. For example, when editing weekly data, the value will be allocated down to the day.

You can also edit multiple measures at a time; however, you can't have circular references. In the following example, Measure3 is used as a source measure for Measure1. But, Measure3 is also being edited at the same time to increase the measure by 10 percent.

<table>
<thead>
<tr>
<th>Measure</th>
<th>Source Measure</th>
<th>Action</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measure1</td>
<td>Measure3</td>
<td>Increase by percentage</td>
<td>10</td>
</tr>
<tr>
<td>Measure2</td>
<td>Measure2</td>
<td>Increase by percentage</td>
<td>10</td>
</tr>
<tr>
<td>Measure3</td>
<td>Measure3</td>
<td>Increase by percentage</td>
<td>10</td>
</tr>
</tbody>
</table>

In this scenario, the planning engine won't know which value of the source measure to use: the original Measure3 value, or the value of Measure3 after increasing it by 10 percent. To avoid circular references, you must handle these edits separately.

Configure Units for a Measure

You can view a measure in several units of measure (UOM) and currencies side by side without needing separate measures. By converting a single measure into various values and currencies, you get superior data consistency and do not require recalculation and data synchronization.
In addition, sometimes different products and organizations have data that is loaded externally using different units of measure. For example, vitamins sold in Europe may be shipped in bottles, while in Asia the quantities are by pill count. By defining units, you enable these values to be converted into a cohesive value, which can be aggregated in a seamless manner.

To configure units for a measure:

1. In the **Navigator**, click a Supply Chain Planning work area.
2. Click the **Tasks** panel tab.
3. In the **Tasks** panel, click **Manage Planning Measures**.
4. Locate the measure for which you want to configure units and click **Edit**.
5. On the **Advanced** tab, select the **Properties** tab.
6. Select **UOM** from the list as the default value for the **Base Units of Measure**.

   The base units of measure define the default unit of measure to which displayed data is converted. It is editable only for numeric measures, which do not have product and organization-based levels. For measures that have product and organization, the definition comes from the data source. When using the measure, you must attempt to select only the relevant UOM entries for the measure to streamline the user process.

7. Select the relevant units of measure from the **Display Unit of Measure**.

You completed defining the unit of measure. You can view the measure using a specific table or graph.

**Note:** To show the same measure with different unit of measures, you can create a copy from the original measure. Rename the duplicated measure to use another unit of measure of your choice. You can show the same measure as both numbers and currencies.

To override the default UOM:

1. Open a table and select **View, Format Measures** to find the measure.
2. Click the measure you want to modify and select the value from the **Unit of Measure** list.
3. Click **Save and Close**.

---

**Configure Currencies for a Measure**

You can view a measure in several units of measure and currencies side by side without having separate measures. By converting a single measure into various values and currencies, you get superior data consistency and do not require recalculation and data synchronization.

To configure currencies for a measure:

1. In the **Navigator**, click a Supply Chain Planning work area.
2. Click the **Tasks** panel tab.
3. In the Tasks panel, click the **Manage Planning Measures** link.
4. Locate the measure for which you want to configure currencies and click **Edit**.
5. On the **Advanced** tab, select the **Properties** tab.
6. Select **Currency** from the list as the default value for the **Base Currency**.

   The base currency defines the default currency to which displayed data is converted and is editable only for currency type measures.

7. Select the relevant currencies from the **Display Currency**.

You completed defining the currencies for a measure. You can view the measure using a specific table or graph.
The currency value is editable only if the measure type is Currency. For numeric measures, you can change the type from Number to Currency. Select the currency that you want to use in this instance of the measure.

**Note:** To show the same measure with different currencies, you can create a copy from the original measure. Rename the duplicated measure to use another unit of measure of your choice. You can show the same measure as both numbers and currencies.

To override the default currency:

1. Open a table and select **View, Format Measures** to find the measure.
2. Click the measure you want to modify and select the value from the **Currency** list.
3. Click **Save and Close**.

### Configure Conditional Formatting for a Measure

Use conditional formatting to change the background color of a cell when a specific condition occurs. Conditional formatting is useful to draw the attention of the user for information that requires action. You define conditions for an individual measure. A measure can have one or more formats applied. The condition is evaluated at the table level using the configured units and currencies. Two tables with different units of measure or currencies defined can have different cells trigger the conditional formats.

To configure global conditions:

1. In the Navigator, click a Supply Chain Planning work area.
2. Click the **Tasks** panel tab.
3. In the Tasks panel, click the **Manage Planning Measures** link.
4. Locate the measure for which you want to apply conditions and click **Edit**.
5. On the **Advanced** tab, select the **Conditional Formatting** tab.
6. Click the + icon to add a row and complete the information.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measure</td>
<td>Locate the measure you want to use to evaluate. Conditional format for a measure can be based on another measure.</td>
</tr>
<tr>
<td>Condition</td>
<td>Compares the selected measure to a value or another measure</td>
</tr>
<tr>
<td>Compare to Measure</td>
<td>Measure to which the selected measure is compared</td>
</tr>
<tr>
<td>Value</td>
<td>When the <strong>Compare to Measure</strong> is empty, this value is used to compare the selected measure</td>
</tr>
<tr>
<td>Color</td>
<td>Defines the color for the cell background when the condition is met</td>
</tr>
</tbody>
</table>

7. Click **Save and Close**.

To configure local overrides to conditions:

1. Open a table and select **View, Format Measures**.
2. Locate the measure that you want to modify and then select the **Use Override Conditional Formatting** check box.

3. The Conditional Formatting section appears. Select a new conditional format to use in your table.

4. For only the Build Plan table accessed through a Supply Planning work area, the Conditional Formatting section also includes the **Apply** and **Name** columns.

   In the **Apply** column, select whether you want the conditional formatting to be highlighted in your Build Plan table all the time or only when you select it from the Highlight Exceptions drop-down list.

   For example, if you set up a conditional format named Resource Overload and select **When selected**, Resource Overload appears in the Highlight Exceptions drop-down list in your Build Plan.

5. Click **Save and Close**.

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**Load Measures from Other Plans**

You can integrate your tactical supply chain planning with your Sales and Operations Planning process by loading preconfigured measure data into your sales and operations plan. Preconfigured measure data can include demand and supply measures from Oracle Fusion Planning Central, demand measures from Oracle Fusion Demand Management, and supply measures from Oracle Fusion Supply Planning. Loading measure data from other plans initiates your sales and operations planning cycle with the latest information coming from your tactical plans.

To load preconfigured measure data values into a sales and operations plan, select measures from a Planning Central, Demand Management, or Supply Planning source plan and copy their data values into a Sales and Operations Planning target plan. When you select a source plan and a target plan, you see a list of available measures that are common to both the plans.

After copying the measure data, you can perform aggregate analysis of the tactical planning data in the Sales and Operations Planning work area.

**Note:** Before copying the measure data, ensure that the source and target plans have run without errors.

Use these steps to load measures from other plans:

1. In the **Navigator**, click the **Sales and Operations Planning** work area link.
2. In the **Tasks** panel drawer, click the **Load Measures from Other Plans** link.
3. On the Load Measures from Other Plans page, select a **From Plan** (source plan name) and a **To Plan** (target plan name).
4. In the Available Measures pane, select the measures you want to load, and move them to the Selected Measures pane.
5. Click **Save and Close**. A scheduled process copies the measure data from the source plan to the Sales and Operations Planning target plan.

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**View the Audit Trail for a Measure**

Use the Audit Trail of Measure Updates table to view the audit trail for a measure. The table displays details of changes made to measure values for auditing purposes. You can view the audit trail for all measure types, such as numeric, date, and string.
The Audit Trail of Measure Updates table is available for Demand Plan, Supply Plan, Demand and Supply Plan, and Sales and Operations Plan types. You can access the audit trail from your respective Supply Chain Planning work area.

Only editable measures that are part of the plan’s measure catalog appear in the Audit Trail of Measure Updates table.

Note: Only the user who updated the measure can view the previous value and new value in the audit row. Other users, who have permissions to view the audit trail, must open the Audit Trail Details page to view the details.

The security permissions are set according to the job roles on a measure group or on a specific hierarchies, such as Item, Organization, Customer or Supplier. For additional details, open the Administer Planning Security page from the task drawer of the Plan Inputs work area.

Use the following steps to view the audit trail for a measure:

1. From a Supply Chain Planning work area, click the Open button and then select a pane.
2. In the Open Table, Graph, or Tile Set dialog box, search for the Audit Trail of Measure Updates table. Select the table and then click OK.
3. On the Audit Trail of Measure Updates tab, type a specific measure name and click Search.
   You can click the Search button without typing any search criteria to display all the measures that have the audit trails.
4. In the Search Results region, you can view the audit trails for a measure, which includes the following information:
   - Measure Name: Name of the measure on which the updates were made.
   - Last Updated Date: Date and time when updates were made to the measure.
   - Updated By: Name of the user who made the updates.
   - Previous Value: Previous value for the measure.
   - New Value: New value for the measure.
   - Details: When you click Details, the Audit Trail Details page opens. You can review additional details, such as levels, members, filtered levels, and filtered members.

Aggregate Levels for Measure Data Imports

Use the Supply Chain Planning Measures template to import measure data. In Demand Management, you can allocate the loaded forecast measure data to the day level. In Sales and Operations Planning, you can allocate the loaded forecast measure data at the planning level as part of a snapshot. For example, if the Financial Forecast Value measure is loaded at the Quarterly and Product Category levels, then the measure data is allocated to the month and item respectively.

You can import measure data at the following aggregate levels:

- Category level in Product dimension
- Weekly for a Manufacturing Calendar in Time dimension. Monthly and Quarterly for a Gregorian or Fiscal calendar in Time dimension.
- Customer level in Customer dimension
- Business Unit or Legal Entity level in Organization dimension
- Division, Region, or Territory level in Sales Organization dimension
You cannot import data at aggregate levels for shared measures, such as Shipments History, Adjusted Shipments History, Bookings History, and Adjusted Bookings History.

**Related Topics**
- Import Templates Used to Create CSV Files for Supply Chain Planning

### Manage User-Defined Measures

#### Create Measures and Assign to a Measure Catalog

In addition to reviewing measures, you use the Manage Planning Measure task to create, edit, duplicate, and delete measures. You can also create measure groups and add predefined and user-defined measures in them.

This topic discusses the following:
- Creating measures
- Duplicating, editing, and deleting measures
- Creating measure groups
- Assigning measures to a measure catalog

#### Create Measures

You can create measures with appropriate privileges if the predefined measures don’t meet your business requirements. The measures that you create have the same features and functionality as predefined measures.

To create a measure:

1. In the Navigator, click a Supply Chain Planning work area link.
   
   You can create measures from one of the following work areas: Demand Management, Supply Planning, Sales and Operations Planning, Demand and Supply Planning, or Plan Inputs.
2. Click the **Tasks** panel tab.
3. In the Tasks panel, click the **Manage Planning Measures** link.
4. Click **Create** from the Actions menu.
   
   a. On the Create Measure page, enter a measure name and description.
   b. Select a measure group.
   c. Select a data type.
   d. Select the **Allow editing** check box if you want the measure to be editable in a pivot table.
   e. Select **Edit Range** to enable the Edit Lock tab, which controls the editable status of the measure.

   The Edit Range value determines the time range over which the measure is editable. The available values are: History, Future, History and Future.
   f. On the Aggregation and Disaggregation tab, define the dimension parameters. Select the dimensions, hierarchy, and hierarchy level within the dimension to store the measure data. When a dimension and hierarchy are selected, the default setting for the Stored Level is the lowest level of the dimension's
hierarchy. You can modify the level to store by selecting the hierarchy from the list and setting the stored level parameter within that hierarchy.

- **Aggregation Parameters:** The Aggregation parameters control the way a measure's data is aggregated. You have two options:
  - Calculate and aggregate: Calculate and Aggregate calculates the measure's expression at the lowest data level and then aggregate up.
  - Aggregate then calculate: Aggregate and Calculate aggregates all measures referenced in this measure's expression and then calculate the expression.

In the Time Dimension field, select the aggregation function that controls how data is aggregated for the time dimension. The Other Dimensions fields are the same as the Time dimension fields. These options control how the data is aggregated across all the dimensions except for time. The Weighted By field is enabled only if you select Weighted Average as the aggregation parameter for either Time or Other Dimensions. It enables you to pick the measure to drive the weighted average calculation.

The aggregation types include: Sum, Average, Weighted Average, Minimum, Maximum, Count, Latest, Median, Variance, and Standard Deviation.

- **Disaggregation Parameters:** The Disaggregation Parameters control how changes to the data at an aggregated level are allocated down for storage. This is used when data changes are made in a pivot table, but also when made by the demand forecast. The weights for each combination, such as item-organization are calculated and stored for the measure during plan run. These weights are used to allocate the data. For example, the forecasts for P1-Org1 and P2-Org1 are 40 and 60 respectively. Therefore, the weights used for allocation would be 40% for P1-Org1 and 60% for P2-Org1.

The parameters for the Disaggregation Type field are: By Measure, By Self, Equal, and Same Value. The default parameter is Equal.

The Disaggregation Basis field is enabled only if you select the Disaggregation Type as By Measure. Select the measure to use as the disaggregation basis from the list of measures.

The Secondary Basis field is enabled only if you have selected the Disaggregation Type field as By Measure or By Self. The values for Secondary Basis are Booking History Average or Shipment History Average.

The Secondary Basis measure is selected in case the basis measure has no value. You can select only measures that contain pre-calculated proportions as a secondary basis. That is, they are calculated during plan run.

- **On the Expression tab,** define any new expressions for a measure. You create an expression when you have to show any value other than its stored information. The expression provides a flexible framework for an extensive variety of calculations and information. An expression for a measure references other measures, operators, and numbers.

In the Expressions subtabs:

- The Functions tab lists the available functions, a description, an example of the function's use.
- The Measures tab lists the available measures, their descriptions, and data type. The Insert button inserts the highlighted measure into the expression building area where functions or arithmetic operations can be specified.
• The Attribute tab lists the attributes available for the Product dimension at Item level. The
description and data type of the attribute is shown in the description pane.

After you complete the expression, use the Validate button to ensure the syntax is correct. An error or
succeeded message is displayed.

h. On the Edit Lock tab, you can define a new expression similar to the measure expression. The difference
is rather than evaluating and displaying the expression result, the expression result is used to control or
refine the editable status of the measure. If the expression evaluates as true, the measure is locked from
editing. The expression is evaluated every time the table is run, and may change as relevant measures or
attributes are modified.

i. On the Advanced tab, click the Properties tab and review the following parameters:

• If you select the Shared measure check box, then the measure is shared across plans. By default,
the parameter isn't selected and hence the measure is plan specific.

• If you select the Refresh with current data check box, then the current measure value needs a
placeholder to store the result in the application. For example, a non-editable measure where the
data is imported from a legacy or other application. Selecting this check box allocates a space to
store the measure by the defined dimensions.

• Conversion Type enables you to define the valid Unit of Measure (UOM) and Currency conversions
that will be available for a measure in a table.

Base Units of Measure defines the default unit of measure used to convert displayed data. The field
is editable only for Numeric measures, which don't have Product and Organization-based levels
(for measures that have product and organization, the definition comes from the data source).
Select any relevant units of measure, which may be useful in a table, graph, or tile. Only the UOMs
that you select will be available for selection in a table or graph.

Base currency defines the default currency to which displayed data are converted. The field is
editable for only Currency type measures.

You use Price lists to convert quantities into values, which are then converted to a currency.

• Data Lookup value enables you to identify a data lookup source that displays the measure as a list
of value. The source attributes have 3 options: None (Default), Level, and List.

  o If Source=Level, you must identify the level and the attribute to display in the measure list.

  o If Source=List, then you can create and maintain the list of values. You can either add or
remove members in this list.

j. On the Advanced tab, click the Goals tab to define if low or high values are better for measure goals.
k. On the Advanced tab, click the Conditional Formatting tab to define conditional formatting settings for
the measure.

5. Click Save and Close.

Assign Measures to a Measure Catalog

To use the user-defined measure in your plan, add the new measure to the plan's measure catalog. Navigate to
Configure Planning Analytics, find the plan's measure catalog on the Measures Catalog tab. In the Available Measures
pane, search for the new user-defined measure, and add it to the Selected Measures. After you perform a plan run you
can create a table or use an existing table, and add your new measure to the table.
Duplicate, Edit, and Delete Measures

You can duplicate, edit, or delete user-defined measures using the Manage Planning Measures task, which is available in the Tasks drawer.

To duplicate the measure: Select a measure from the list of measures, select the Action menu on the toolbar, and then click Duplicate. Duplicating the existing measure gives you a starting point for creating a new measure definition. When you duplicate a measure the default name is Copy of <original measure name>. Other definitions of the duplicated measure remain the same as the original measure.

To edit the measure: Select a measure from the list of measures, select Actions menu, and then click Edit. Editing a measure enables you to select an existing measure and edit its attributes.

To delete the measure: Select a measure from the list of measures, select Actions menu, and then Delete. A complete list of all objects including tables and measure groups are be displayed to ensure you are aware of impacts of deleting a measure.

Create Measure Groups

Use Manage Planning Measures task to create a measure group. Measure groups are created to group measures together that you need frequently. Depending on your business need you can create measure groups and associate measures with appropriate groups.

To create a measure group:

1. In the Navigator, click a Supply Chain Planning work area link.
2. Click the Tasks panel tab.
3. In the Tasks panel drawer, click the Manage Planning Measures link.
4. Click Create Group from the Actions menu.
   o Enter a name and description.
   o From the Available Measures pane you can select measures and move to the Selected Measures pane.
5. Click Save and Close.

You can also create Measure Groups in the Selector tool when you create or edit a table or graph. In the Group field in the header section, select Manage Groups from the list of values. Use the plus icon, +, to add a row, type a name, and click Save.

Configure Global Goals for Measures

You can define global goals for a measure using the Goals tab when you create or edit a measure. On the Create Measure page, click the Advanced tab and then select the Goals tab to configure global goals.

Define if low or high values are better. For example, a high value is good for revenue; a low value is good for expenses.

For global goals, you can provide a low range or a high range.

Goals option is available only for measures of type Currency, Number, and Percent. Using Global Goals, you can first define if low or high values are better for a measure. The ranges are displayed on the page when you are viewing a measure in comparison with its goal, for example, in an infotile. Global goals are measure level parameters and are
not defined specifically for a subset of the data. For example, you cannot have a goal of 1000 for one organization and 50000 for another.
7 Manage Exceptions

Exceptions and Exception Sets

Overview of Exceptions and Exception Sets

On the Configure Exceptions page, you can select an exception and edit the thresholds for reporting. You can configure only those exceptions that are relevant to your Supply Chain Planning work area.

On the Configure Exception Sets page, you can restrict the exceptions that are computed as part of the plan run. You can also control the organizations, item categories, time period, and so on for which to compute exceptions.

A defined exception set is associated with a plan. The plan evaluates the exceptions using the filters associated with the exception set. The exception set executed during the plan run is defined on the Plan Options page.

How You Edit Exceptions

To edit exception parameters, select an exception on the Configure Exceptions page. You can configure only those exceptions that are relevant to your Supply Chain Planning work area.

In the Edit Exception dialog box, there is an area for General Properties and Exception Detail. Depending on the Supply Chain Planning work area that you’re in, you can see the following tabs in the Exception Detail section:

- Demand Management work area: Level, Threshold, and Notification
- Supply Planning work area: Level, Threshold, and Notification
- Planning Central work area: Level and Threshold
- Sales and Operations work area: Level, Threshold, and Notification

You can edit Level and Threshold only for those exceptions whose basis is Measure. For exceptions whose basis is Order, you can edit only the Threshold.

On the Level tab, the dimensions for the exception are derived from the base measure. You can edit the default values for hierarchy and level.

On the Threshold tab, the base measure used in the exception is compared to either a value or another measure. If the threshold is specified in terms of a value, the value is interpreted in terms of the data type of the base measure. To ensure that exceptions return meaningful values, set the threshold to an appropriately high or low value.

On the Notification tab, set up notification rules for exceptions. Configure exceptions to trigger notifications to specific users or roles. In the Details section specify the entity and condition for notifications. Notifications are sent automatically at the end of the plan run.
Configure Exception Sets

Use the Configure Exception Sets page to create, modify, or copy an exception set. The set of exceptions and their scope that is calculated by the plan is configured on the Create or Edit Exception Set page. When creating an exception set, you must first specify which exceptions to include in the set.

The exception set also enables you to restrict the generation of exceptions to specific organizations, categories, suppliers, and customers. You can then point to the exception set on the Plan Options page for a plan.

Set Filters on Planning Dimensions for Exception Reporting

After selecting available exceptions for an exception set to use in a plan, you can add filters on some of the key planning dimensions. The levels on which you can define filters are organizations, categories, suppliers, and customers.

On the Configure Exception Sets page in the Filters tab, select one or more organizations, suppliers, categories, and customers in each of the tables for which to generate exceptions. If you do not specify a filter for a level, you will generate exceptions for all records in that level. For example, if you do not specify an organization, exceptions will be generated for all planning organizations when a plan is run. If any of the organizations, categories, suppliers, or customers in the exception set are not available in the plan, they will be ignored.

In the Exception Cutoff Days field, specify the number of calendar days, starting from the plan start date, from which to generate the exceptions. If this field is blank, exceptions will be generated for the full planning horizon.

Exceptions in Plans

Plan Exceptions

Exceptions are a key element to evaluate and improve your plan in Supply Chain Planning. After you run a plan, view the exceptions to understand the quality of the plan and to get visibility of key problem areas. You can focus on key exceptions to understand their root causes. From the exceptions tables, you can drill down to other plan views for more details into the problem areas. After taking actions to resolve exceptions, run the plan again to evaluate whether the plan is now acceptable.

Oracle provides several predefined exceptions that the Supply Chain Planning processes compute after you run a plan. View these exceptions to identify problem areas in the plan that may need your attention. To view a list of the exceptions, open your plan and then open the Exceptions table.

The exception types and their calculation logic are predefined. However, to ensure that only significant deviations are highlighted, you can edit the conditions under which the exceptions are generated. You control which exceptions are calculated for a plan by specifying an exception set on the Plan Options page. View the metrics associated with exceptions, such as by count or by quantity, in tables or graphs at different hierarchical levels.

Open the predefined Exceptions table to view the exceptions grouped within the following folders:

- Demand Planning Exceptions. You can access this folder from the Demand Management, Planning Central, and Sales and Operations Planning work areas only.
• Supply Planning Exceptions. You can access this folder from the Supply Planning and Planning Central work areas only.
• Sales and Operations Planning Exceptions. You can access this folder from the Sales and Operations Planning work area only.
• Views for Multiple Exceptions. You can access this folder from the Supply Planning and Planning Central work areas only.

You can see the number of exceptions generated within parentheses after the exception name. Click the exception name to view a table with details of the exception. From the exception table, you can:
• Search for exceptions for a specific item and organization within a specified date range.
• Save the search criteria for future searches.
• Export the table to a spreadsheet, rearrange columns, and perform other standard table actions on the table.

Predefined views within the Views for Multiple Exceptions folder enable you to view all exceptions for an item, resource, or supplier within the same table.

From tables that show exception data, you can navigate in context to other plan data. This navigation capability is useful when, for example, you are viewing exceptions for an item and you also want to see its supply or resource availability.

Configure Exception Thresholds

You can control the number of exceptions that your plan generates by changing the levels at which an exception is computed and its threshold value. A higher threshold value typically results in fewer exceptions.

To configure exception thresholds, do the following:

1. From a Supply Chain Planning work area, select the Configure Exceptions task.
2. On the Configure Exceptions page, select an exception.
3. Click Actions and then select Edit.

Demand planning and sales and operations planning exceptions are measure-based exceptions. A base measure forms the foundation for these exceptions.

In the Planning Central work area, you cannot change the base measure, but you can edit the level at which the exception is computed and its threshold value.

Most supply planning exception calculations are for a specific order and are not associated with a base measure. For these types of exceptions, select the fact associated with the exception and modify the condition that specifies when to generate the exception. Think of a fact as an attribute of the exception. Typical facts are quantity and value.

Create Tables and Graphs for Exceptions

Create a table or graph for plan exceptions based on their measures, such as number of exceptions generated, and the quantity associated with the exception.

Creating a Table for Exceptions

1. In a Supply Chain Planning work area, open a plan.
2. Click the Actions button and select Manage Tables, Graphs, and Analysis Sets from the list.
3. In the Manage Tables, Graphs, Analysis Sets dialog box, click **Actions**. Next, select **Create** and then select **Table**.

4. On the Create Table page, do the following:
   - Enter a name for your table.
   - Select a group.
   - Enter a description.
   - Select the type of access (public or private).

5. On the Measures tab, do the following:
   a. In the Available Measures section, expand the Overall Plan Health folder.
      The Overall Plan Health folder contains the measures associated with exceptions.
   b. Select the exception facts that you want to view in the table.

6. On the Hierarchies tab, include the Exception Type hierarchy.
7. On the Members tab, select the exception types to display in the table.
8. Click **Save and Close**.

**Creating a Graph for Exceptions**

1. In a Supply Chain Planning work area, open a plan.
2. Click the **Actions** button and select **Manage Tables, Graphs, and Analysis Sets** from the list.
3. In the Manage Tables, Graphs, Analysis Sets dialog box, click **Actions**. Next, select **Create** and then select **Graph**.
4. On the Create Graph page, do the following:
   - Enter a name for your graph.
   - Select a group.
   - Enter a description.
   - Select the type of access (public or private).

5. On the Measures tab, do the following:
   a. In the Available Measures section, expand the Overall Plan Health folder.
      The Overall Plan Health folder contains the measures associated with exceptions.
   b. Select the exception facts that you want to view in the graph.

6. On the Hierarchies tab, include the Exception Type hierarchy.
7. On the Members tab, select the exception types to display in the graph.
8. On the Layout tab, do the following:
   a. In the Graph Layout Options section, select a type of graph.
   b. Configure your graph in the horizontal panels below the Graph Layout Options.
      The horizontal panels below the Graph Layout Options section vary, depending on the type of graph that you select. For example, if you select Pie Graph for your graph type, the horizontal panels include General Options, Pie Slice, and Formatting.

9. Click **Save and Close**.

**Related Topics**

- How You Manage Tables, Graphs, Analysis Sets, Infotiles, and Tile Sets
User-Defined Exceptions

Create User-Defined Exceptions

You can create an exception based on your business requirements and focus on a specific area to improve your supply chain planning capabilities. For example, you can create an exception to identify resource overloads when the resource utilization percentage is greater than 110%.

User-defined exceptions are measure-based exceptions. A measure forms the foundation for that exception. After you select a measure, you can specify the dimension hierarchy and level for that measure, and the threshold value or measure to generate the exception.

Follow these steps to create a user-defined exception in a Supply Planning, Demand Management, or Sales and Operations Planning work area:

1. In a Supply Chain Planning work area, click the Tasks panel drawer and click Configure Exceptions.
2. On the Configure Exceptions tab, click Actions, and then click New.
3. On the Create Exception page, specify the general properties.
4. In the Exception Detail section, provide Level, Threshold, and Notification details.
5. Click Save and Close.
8 Manage Planning Cycles

Overview of Planning Cycles

Sales and Operations Planning is a process of recurring planning cycles consisting of activities, tasks, and participants. You manage your Sales and Operations Planning process by using the predefined, but configurable, process activities and dashboards. The planning cycle combines reviews of product development, demand, and supply with a focus on future actions, and aligns operating plan performance with financial goals.

Create a sales and operations planning cycle on the Manage Planning Cycle page in the Sales and Operations Planning work area. Define your template on the Manage Planning Cycles page: What are your activities, what are the tasks, and who are the participants for each stage. You can edit the planning cycle later, as needed. Create templates from templates used in prior planning cycles, which you can configure to align with your Sales and Operations Planning process as it evolves.

The following table describes the five preconfigured review stages of a Sales and Operations Planning process that is managed by the planning cycle.

<table>
<thead>
<tr>
<th>Review Stage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demand Review</td>
<td>Analyze forecasts for new and existing products based on the inputs from sales and marketing to reach consensus on the future unconstrained demand plan.</td>
</tr>
<tr>
<td>Supply Review</td>
<td>Use the latest consolidated, unconstrained demand plan and analyze the feasibility of internal and external supply capacity to fulfill demands. For example, you analyze whether there is sufficient supplier and resource capacity and inventory to balance supply with demand.</td>
</tr>
<tr>
<td>Financial Review</td>
<td>Compare the profitability of operational plans for the current fiscal year relative to the financial forecast target.</td>
</tr>
<tr>
<td>Executive Review</td>
<td>Make decisions and approve operational plans.</td>
</tr>
</tbody>
</table>

The Sales and Operations Planning process does not require you to have all of the review stages. If you do not have a product review or a formal executive review, then do not add any participants or tasks for those review stages.

You can use the Configure Planning Cycle Stages dialog box to rename or hide a review stage. For example, you can rename Demand Review to Demand and Supply Balancing. To rename or hide a review stage, navigate to the Manage Planning Cycles page, open the planning cycle, and then click **Actions > Configure Stages**.
Create a Planning Cycle

Use the predefined planning cycle template called Default_PlanCycle to initially create a planning cycle. You can modify the planning cycle to model the activities, tasks, and participants that you want to use in your Sales and Operations Planning process. Use links to associate a task with a relevant dashboard or report to carry out each task. You can link to graphs, tables, tile sets, and layouts. Use your user-defined planning cycle as a template for future planning cycles to copy over all activities, tasks, and participants.

**Note:** When you copy a planning cycle, changes that you made to that planning cycle's stage names and your choices to display stage names or not are copied over to the new planning cycle. Use the Configure Planning Cycle Stages dialog box to rename or display a review stage in your new planning cycle.

Follow these steps to create a planning cycle using the predefined Default_PlanCycle template:

1. Navigate to the Manage Planning Cycles page:
   a. In the Navigator, under Supply Chain Planning, click the **Sales and Operations Planning** work area link.
   b. In the Sales and Operations Planning work area, click the **Tasks** panel tab.
   c. In the Tasks panel drawer, under Planning Cycles, click the **Manage Planning Cycles** link.
2. On the Manage Planning Cycles page, in the **Actions** menu, select **Create**.
3. In the Create Planning Cycle dialog box, enter or select the following values:

<table>
<thead>
<tr>
<th>Field</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning Cycle to Copy</td>
<td>Select the planning cycle template from which to copy. Use the predefined planning cycle template called Default_PlanCycle to initially create a planning cycle.</td>
</tr>
<tr>
<td>Planning Cycle</td>
<td>Enter a name for your planning cycle, such as: SOP FY2019 January.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description for the planning cycle that you are creating.</td>
</tr>
<tr>
<td>Start Date</td>
<td>Enter a start date for your planning cycle in the following format: mm/dd/yy.</td>
</tr>
<tr>
<td>End Date</td>
<td>Enter an end date for your planning cycle in the following format: mm/dd/yy.</td>
</tr>
</tbody>
</table>
| Plan                  | Select a sales and operations plan to associate with the current planning cycle. The link that you set up for an activity or task ties that report to the plan.  
                         | You can select multiple plans. For example, you can select the current baseline plan and alternative plans under consideration for the current planning cycle. |

4. When done entering or selecting values, click **Save and Continue**.

The Manage Planning Cycles page, Product Review tab appears where you can configure your planning activities, tasks, and participants.
5. To create an activity, do the following:
   a. Click the Create icon and select **Activity**.
   b. In the Create Activity dialog box, enter or select the following values:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Enter a title for your activity.</td>
</tr>
<tr>
<td>Category</td>
<td>Displays the name of the planning cycle category, such as Product Review, Demand Review, Supply Review, and so on.</td>
</tr>
<tr>
<td>Owner</td>
<td>Select the owner of the activity.</td>
</tr>
<tr>
<td>Assignee</td>
<td>Select the assignee for the activity.</td>
</tr>
<tr>
<td>Type</td>
<td>Select General or Meeting.</td>
</tr>
<tr>
<td>Link</td>
<td>Select a table, graph, tile set, or layout to which to link. The link that you set up for the activity ties that report to the plan.</td>
</tr>
</tbody>
</table>

   c. When done, click **Save and Close** to return to the Manage Planning Cycles page, Product Review tab.

6. To create a task, do the following:
   a. Click the Create icon and select **Task**.
   b. In the Create Task dialog box, enter or select the following values:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity Title</td>
<td>Select an activity to which to associate the task.</td>
</tr>
<tr>
<td>Title</td>
<td>Enter a title for your task.</td>
</tr>
<tr>
<td>Owner</td>
<td>Select the owner for the task.</td>
</tr>
<tr>
<td>Assignee</td>
<td>Select the assignee for the task.</td>
</tr>
<tr>
<td>Due Date</td>
<td>Select one of the following for a date by which the task must be completed:</td>
</tr>
<tr>
<td></td>
<td>• Offset days from cycle start: Enter the number of days from the start of the cycle.</td>
</tr>
<tr>
<td></td>
<td>• Fixed: Enter a specific date.</td>
</tr>
<tr>
<td>Type</td>
<td>Select General or Meeting.</td>
</tr>
</tbody>
</table>
### Configure Planning Cycle Stages

Sales and Operations Planning provides five preconfigured review stages in a planning cycle: Product Review, Demand Review, Supply Review, Financial Review, and Executive Review. You can change the review stage names to better align with your organization's planning processes. For example, you can rename Demand Review to Demand and Supply Balancing. You can also choose to not display a review stage tab in your planning cycle. Use the Configure Planning Cycle Stages dialog box to rename or hide a review stage, which you navigate to from the Manage Planning Cycles page.

In Manage Planning Cycles, you create a planning cycle by using an existing planning cycle as a template. When you copy a planning cycle, changes that you made to the planning cycle stage names and your choices to display stage names or not are copied over to the new planning cycle.

**Note:** You can only have up to five review stages in a planning cycle, and you must display at least one stage. Also, the planning cycle stage name must be unique; the name cannot already exist in the planning cycle.

Use the following steps to rename your review stages or to hide a stage for the planning cycle:

1. **Open the Configure Planning Cycle Stages dialog box:**
   a. From the Sales and Operations Planning work area, click the Tasks drawer and then click Manage Planning Cycles.
   b. On the Manage Planning Cycles page, search for and select your planning cycle.
   c. When the planning cycle opens, click Actions and then select Configure Stages.
      The Configure Planning Cycles Stages dialog box opens.

2. In the **Stage Name Override** column, enter a new name to use instead of the predefined review stage name.
The planning cycle stage name that you enter must be unique. The name cannot already exist in the planning cycle.

3. In the **Enabled** column, select **Yes** to display the tab or **No** to hide the tab for that stage on the user interface.
   
   You must have at least one planning cycle review stage set to **Yes**.

4. When done, click **Save and Close**.
   
   Your changes appear on the Manage Planning Cycles page. If you use this planning cycle as a template for a new planning cycle, your changes carry over to the new planning cycle.

---

**How You Work in a Planning Cycle**

After you create and configure your planning cycle in Sales and Operations Planning, open it to monitor the progress of your activities and tasks. You can see where you are in the planning process and create action items, if needed. You can see how many steps have completed, as well as the time to get work done to close a task.

When you open a planning cycle from the Sales and Operations work area, you will see only the review tabs for which you have participants and tasks assigned. For example, you have no participants assigned for the Executive Review, so the Executive Review tab does not appear when you open the planning cycle. If needed, you can modify the planning cycle and add participants and tasks for the Executive Review.

The tabs for a planning cycle are:

- Overview
- Product Review
- Demand Review
- Supply Review
- Financial Review
- Executive Review
- Notes

You can access the Overview and Notes tabs and the tabs for the stages in which you are a participant. For example, a demand planner might be a participant in the product, demand, and supply reviews but not for the financial or executive reviews.

The Overview tab displays an overview of the overall Sales and Operations process where you can monitor progress to date. The Overview tab also provides a timeline, list of assigned tasks, and participants. You can filter the Worklist and Timeline sections by review phase, such as Supply Review.

The Product Review, Demand Review, Supply Review, Financial Review, and Executive Review tabs all have the same user interface. Each tab contains editable lists of planning activities, tasks, and action items. Each task is associated with an owner, due date, and status.

Each review type displays the following panes:

- **Planning Activities**: Displays the list of activities and tasks for the review process. This list is editable, so you can insert additional tasks when needed.

- **Action Items**: Lists action items assigned during the review process and their status. Each task has an owner, assignee, due date, and status. Action items can have a link to a relevant dashboard or report to carry out each task.
• **Decision Items:** Displays a list of recommendations and alternatives to consider for discussion in an upcoming review meeting. You can escalate the decision items from the review stage. If you cannot make a decision about the item, you can defer the decision and push the decision item out to a later stage.

The Notes tab is where you can document and communicate important information. For example, use Notes to document why there was a change to the plan or record decisions and assumptions that led to those changes. In Sales and Operations Planning, you can associate notes with objects, such as product categories. With such documentation, you can understand why decisions were made and who made them.

To open a planning cycle:

1. In the Navigator, click the Sales and Operations Planning work area link.
2. In the **Tasks** panel drawer, click the **Open Planning Cycle** link.
3. In the Open Planning Cycle dialog box, select a planning cycle.
4. Click **OK**. Your planning cycle opens on the Edit Plan page.

### Planning Cycle Phases

#### Product Reviews

The Sales and Operations Planning product review process helps channel new product development by providing decision makers with visibility into the key revenue and profitability metrics associated with the new product introduction. You can measure the profitability of a new product through an analytic that shows the revenue for new product items.

The predefined Product Review dashboard in the Sales and Operations Planning work area enables you to perform a cross-functional review of new products and the life cycle of maturing products. The dashboard has four predefined infotiles that enable you to monitor the health across the product life cycle from prelaunch planning to postlaunch performance. You can also view metrics associated with end-of-life items.

The four infotiles on the Product Review Summary dashboard are:

- **New Product Vitality:** Displays the percentage of revenue contributed by a new product. New product revenue is the revenue from expected sales for products that have their Lifecycle Phase item attribute set to Prelaunch, Postlaunch, or Growth.

- **Shipments Forecast Value Change:** Displays the difference in Shipments Forecast Value between the current estimate and its value in the last MAPE archive across all prelaunch items.

- **Bottom MAPE for Postlaunch Items:** Displays Bottom Shipments Forecast MAPE for postlaunch items associated with shipments forecast.

- **Periods of Cover for Declining Items:** Displays the Projected Available Balance Periods of Cover for Decline Item measure. This measure is calculated as the ratio of the projected available balance to the total demand.

**Related Topics**

- Generate a Forecast for a New Product
- Overview of Plan Archival in Supply Chain Planning
Demand Reviews

The Sales and Operations Planning demand review process enables the collaboration within an enterprise required to develop an unconstrained consensus forecast. The consensus forecast is a single set of forecast numbers that the enterprise determines.

Use the Demand Review Summary dashboard in the Sales and Operations Planning work area to identify significant gaps between lagged consensus forecast and actual sales. From the dashboard, you can drill down to various tables to make forecast adjustments.

The four infotiles on the Demand Review Summary dashboard are:

- **Unconstrained versus Forecast**: Displays the comparison between the Unconstrained Operating Plan Value and the Financial Forecast Value. The Unconstrained Operating Plan Value is the value of all of the demand planned for. The Financial Forecast value is the forecast estimate (in currency).
- **Consensus Forecast Value Change**: Displays the change between the Consensus Forecast Value, the current consensus forecast, and the previous value in the last MAPE archive.
- **Forecast Value Comparison**: Displays the comparison between the Consensus Forecast Value and the Final Sales Forecast Value.
- **Stakeholder Forecast MAPE**: Displays the comparison between the forecast accuracy performance and stakeholders. This infotile compares the sales, marketing, and consensus forecasts.

Supply Reviews

The Sales and Operations Planning supply review process helps you to measure and improve key metrics to produce according to your plan. Use the latest consolidated, unconstrained demand plan and analyze the feasibility of internal and external supply capacity to fulfill demands. For example, you can analyze whether there is sufficient supplier and resource capacity and inventory to balance supply with demand.

The supply review process uses the demand plan from the Demand Review and the available supplier and resource capacity and other supply information for supply planning. The process also determines the ability to meet the consensus-based demand plan, compares future supply planning performance with archived, historical measures. After you make the consensus forecast adjustments in the demand review process, you can rerun the supply plan. Running the supply plan enables you to evaluate where you can create sufficient additional supply to meet increased demand.

Use the Supply Review Summary dashboard in the Sales and Operations Planning work area to view the following graphs:

- **Demand and Supply**: View the total demand compared to the total supply to determine if there are any gaps.
- **Resource Overloading**: Drill down into detailed graphs that show you organizations with overloaded resources. For example, you can drill down to the Resource Plan by Month table. In the Resource Plan by Month table, you can identify the resources and the time buckets in which resources are constrained.
- **Supply Overloading**: View the key time periods and supplier items that have a large number of exceptions. You can drill from individual items in the Exceptions Top Utilized Items graph to view the plan for the associated suppliers of that item.
- **Inventory Turnover**: View this graph to monitor inventory cover.
- **Cost Comparison**: View the manufacturing, purchase, carrying, and shipping costs.
Financial Reviews

The Sales and Operations Planning financial review process provides visibility into financial metrics. You can compare operational plans with the business plan and financial budget. You can review revenue, costs, margins, inventory value, and other performance measures. You can identify whether overall revenue and profits are tracking to plan, and identify key areas of improvement.

The Financial Review dashboard in the Sales and Operations Planning work area has five pre-defined infotiles that provide you with visibility into revenue and profit details:

- **Plan versus Forecast:** Compares the Operating Plan Value and Financial Forecast Value. The Operating Plan Value is the sum of the values of Shipment History and the Constrained Forecast value.
- **Unmet Revenue:** Displays unmet revenue, which is calculated based on the value of demand that cannot be met on time.
- **Cost Comparison:** View the manufacturing, purchase, carrying, and shipping costs.
- **Gross Margin:** Displays the overall gross margin between revenue and cost.
- **Revenue and Gross Margin Percentage:** Displays the revenue and gross margin percentage.

Executive Reviews

The Executive Review dashboard supports the Sales and Operations Planning meeting. This meeting occurs every planning cycle in which senior stakeholders meet. The dashboard, which you access from the Sales and Operations work area, provides executive visibility to performance indicators, forecast issues, and operational issues. Senior stakeholders can see gaps between the recommended operating plan and the financial budget. The stakeholders can then make decisions to resolve issues and approve the operational plan. The approved sales and operations plan drives tactical planning.

The Executive Review dashboard provides visibility into key performance indicators, business trends, new product development metrics, and supply and demand mismatches across the process stages. The Executive Review dashboard contains seven predefined infotiles:

- **Plan versus Forecast:** Compares the Operating Plan Value and Financial Forecast Value. The Operating Plan Value is the sum of the values of Shipment History and the Constrained Forecast value.
- **New Product Vitality:** Displays the percentage of revenue contributed by a new product. New product revenue is the revenue from expected sales for products that have their Lifecycle Phase item attribute set to Prelaunch, Postlaunch, or Growth.
- **Forecast Value Comparison:** Displays the comparison between the Consensus Forecast Value and the Final Sales Forecast Value.
- **Cost Comparison:** View the manufacturing, purchase, carrying, and shipping costs.
- **Gross Margin:** Displays the overall gross margin between revenue and cost.
- **Revenue and Gross Margin Percentage:** Displays the revenue and gross margin percentage.
- **Inventory Turnover:** View this graph to monitor inventory cover.
9 Manage Sales and Operations Plans

Overview of Sales and Operations Plans

Before you can run a sales and operations plan, you must create the plan and define its options. Plan options determine the actions of the planning services by specifying the type of plan to run. These options specify the scope of the plan in terms of organizations, items, resources, time horizon, planning measures, and more. Plan options also configure whether to plan demand and supply separately or sequentially within a plan. Use the Create Plan page in the Sales and Operations Planning work area to create the plan and define its options.

Navigate through the following tabs on the Create Plan page to set up plan options for your sales and operations plan:

- **Scope**: Specify plan organizations, items, time horizon, and measures used in the plan.
- **Demand**: Specify forecasting profiles to include when planning demand.
- **Supply**: Specify general and organization-specific options for planning supply.

The Manage Plans page in the Sales and Operations Planning work area is for integrated plan management. The following are some of the tasks that you can perform from the Manage Plans page:

- Create and define plans
- Create a copy of existing plans
- Open an existing plan
- Run plans in batch mode
- Perform data refresh on your plans
- Approve plans

For existing sales and operations plans, use the Manage Plans task to search for and open a plan. To access the Manage Plans page and open an existing sales and operations plan, do the following:

1. From the Navigator click the **Sales and Operations Planning** work area link.
2. Click **Manage Plans** from the Tasks drawer.
3. On the Manage Plans page, provide the appropriate search criteria and click **Search**.
4. In the search results area, select your plan and click the **Actions** button.

Manage Plans

Actions to Manage Your Plans

The Actions menu on the Manage Plans and the Edit Plan pages are integrated plan management pages for all plan types. When you open the Edit Plan page, note that only the plan name displays in the heading.

**Note**: Not all action options are available on both the Manage Plans page and the Edit Plan page. For example, the Compare action is only available when you are in an open plan on the Edit Plan page. Also, not all action options are available for all plan types or work areas. For example, the Planning Central work area does not include Archive, Compare, or Copy to Simulation Set in the Action menu.
The following table lists the available options in the Actions menu and the description of each option.

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approve</td>
<td>Initiate and complete the approval process for a plan. When you rerun the plan, the Approved status is removed from the Approval Status column.</td>
</tr>
<tr>
<td>Archive</td>
<td>Archive a plan.</td>
</tr>
<tr>
<td>Cancel Compare</td>
<td>Cancel the comparison of plan data.</td>
</tr>
<tr>
<td>Close</td>
<td>Close a loaded plan from memory. This option is not available for Demand Plan types.</td>
</tr>
<tr>
<td>Compare</td>
<td>Compare plan data with another plan.</td>
</tr>
<tr>
<td>Copy to Simulation Set</td>
<td>Open the Copy to Simulation Set dialog box to copy plan data to an existing simulation set. Plan data includes items, resource availability, bill of resources, and so on. This option is available only for Supply Plan and Demand and Supply Plan types.</td>
</tr>
<tr>
<td>Create</td>
<td>Open the Create Plan dialog box where you can define the plan options for your new plan. Depending on your plan type, define the scope, demand, safety stock, and supply options. The Safety Stock tab is not available for Sales and Operations Plan types.</td>
</tr>
<tr>
<td>Delete</td>
<td>Delete a plan and its archive versions. This irrevocable action purges the plan from memory and the database.</td>
</tr>
<tr>
<td>Duplicate</td>
<td>Create a copy of an existing plan to leverage previously defined plans or to perform what-if simulation analysis. You can decide whether you want to copy only the plan options or copy the plan options including plan data.</td>
</tr>
<tr>
<td>Edit Plan Options</td>
<td>Open the Plan Options dialog box where you can edit your plan options. Depending on your plan type, you can change the scope, demand, safety stock, and supply options.</td>
</tr>
<tr>
<td>Export</td>
<td>Export the data from the Search Results table on the Manage Plans page to a spreadsheet.</td>
</tr>
<tr>
<td>Load</td>
<td>Load the plan into memory. This option is available only for Sales and Operations Plan types.</td>
</tr>
<tr>
<td>Manage Tables, Graphs, and Analysis Sets</td>
<td>Open the Manage Tables, Graphs, and Analysis Sets dialog box. You can search for tables, graphs, tiles, tile sets, and analysis sets and manage them.</td>
</tr>
<tr>
<td>Open</td>
<td>Open the Edit Plan page for an existing plan. Note that only the plan name displays in the page heading.</td>
</tr>
<tr>
<td>Action</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Publish Order Forecast</td>
<td>Starts the Publish Order Forecast job. You can publish the order forecast without saving the plan to the database. This option is available in the Actions menu on the Items, Supplies and Demands, and Manage Plans page. This option is available only for Supply Plan, and Demand and Supply Plan types.</td>
</tr>
<tr>
<td>Publish Data</td>
<td>Export measure data from a plan based on a pivot table. You can export the data available in planning data measures at any aggregation level based on an existing pivot table to a file in a comma delimited (CSV) file format.</td>
</tr>
<tr>
<td>Release</td>
<td>Release the plan from the Supply Chain Planning work area to another plan execution system. This option is available only for Supply Plan, and Demand and Supply Plan types. The Release action integrates Supply Chain Planning with other plan execution systems by publishing approved planning recommendations to execution systems. These plan recommendations can be in the form of new planned orders, rescheduled existing supplies, and canceled existing supplies.</td>
</tr>
<tr>
<td>Request Approval</td>
<td>Request approval of a plan. This option is available only for Sales and Operations Plan types.</td>
</tr>
<tr>
<td>Reset Approval Status</td>
<td>Reset the approval status. This option is not available for Supply Plan types.</td>
</tr>
<tr>
<td>Review Plan Messages</td>
<td>Open the Review Plan Messages tab to review the warning and error messages generated by the planning processes, such as forecast generation and supply plan generation. You can also review the recommendations to address the warning and error conditions.</td>
</tr>
<tr>
<td>Run</td>
<td>Run the plan and generate data. When you click Run, the Run Plan dialog box opens. In the Run Plan dialog box, you can select data refresh options, scope options, and demand and supply plan run options to generate planning data.</td>
</tr>
<tr>
<td>Save Plan to Database</td>
<td>Save the plan from the memory to the database. The benefit of saving a plan to the database is that you can perform plan analysis without first loading the plan. This option is available only for Supply Plan and Demand and Supply Plan types.</td>
</tr>
<tr>
<td>View Status Details</td>
<td>Open the Plan Status Details dialog box to view all of the actions performed by any user for the selected plan. You can also export status details to a spreadsheet.</td>
</tr>
</tbody>
</table>

**Related Topics**

- [Overview of Supply Chain Planning Plan Types](#)
Create a Plan

You can create plans and then duplicate them to save time and perform planning activities incrementally. For example, you have defined the line of business associated with an existing plan, such as organizations and items. You can create a copy from that existing plan rather than define a new plan.

Use this generic procedure to create a plan.

1. In a Supply Chain Planning work area, click the Tasks panel tab.
2. In the Tasks panel drawer, click the Manage Plans link.
3. In the Search Results region, from the Actions menu, select Create.
4. On the Create Plan page, complete the general information for the plan:
   a. Enter a name.
   b. (Optional) Provide a description for the plan.
   c. Select the plan type.
   d. Select a supply planning mode.

   **Note:** The Supply Planning Mode attribute is only available for a supply plan, demand and supply plan, or a sales and operations plan type.

   - Supply plan and demand and supply plan types: Options are Constrained and Unconstrained. Constrained is only available if you have opted in for Constraint-Based Supply Planning. Otherwise, the supply planning mode defaults to Unconstrained.
   - Sales and operations plan type: The supply planning mode defaults to Aggregate.
   e. (Optional) Select the Enable for OTBI reporting check box to make measures from a plan available in Oracle Transactional Business Intelligence (OTBI) for reporting.
   f. Select the owner.
   g. Define the access level:
      i. Select Public to make the plan accessible for all users.
      ii. Select Private to restrict the plan accessible to you and to a list of users that you want to provide access.
5. Based on the type of plan that you selected, complete the required information in one or more tabs (Scope, Demand, Safety Stock, and Supply).
6. Click Save and Close.

Copy a Plan

You can create plans and then duplicate them to save time and perform planning activities incrementally. For example, you have defined the line of business associated with an existing plan, such as organizations and items. You can create a copy from that existing plan rather than define a new plan.

Use the Duplicate procedure to:

- Create a copy of an existing plan that includes the plan data.
- Create only a copy of plan options.
Use these steps to copy a plan.

1. Navigate to the Duplicate Plan dialog box:
   a. In the Navigator, click a Supply Chain Planning work area link.
   b. Click the **Tasks** panel tab.
   c. In the Tasks panel drawer, click the **Manage Plans** link.
   d. Enter the search parameters and click the **Search** button.
   e. In the Search Results region, select the plan that you want to copy, click **Actions**, and then select **Duplicate**.

2. In the Duplicate Plan dialog box, complete the following information for the plan:
   a. Select a copy type:
      - **Copy plan options only**: The planning process copies plan options to the duplicate plan, but not the plan data.
        Typically, when you duplicate the plan with the Copy plan options only option, the next step is to edit the plan options before running the plan.
      - **Copy plan with reference to base plan**: When you duplicate the plan with reference to the base plan, the next step is to open the copied plan as you’re likely to make edits before running the plan. On the Manage Plans page, the Copied From column displays the name of the plan that you copied from.
      - **Copy all plan data with no reference to base plan**: The planning process makes a full, standalone copy of the plan.
        On the Manage Plans page, the Copied From column is blank. This option isn't available for demand plan types.
   b. Enter a name and a description.
   c. Define the access level:
      - Select **Public** to make the plan accessible for all users.
      - Select **Private** to restrict the plan accessible to you and to a list of users that you want to provide access.
   d. (Optional) Select the **Load plan after copy** check box. This check box isn't available for demand plan or sales and operations plan types.
   e. Select the owner.

3. Click **Save and Close**

View a Plan

If you already have an existing plan, you can open the plan from the Plans drawer or by using the Manage Plans task. You must always run a plan before you can view it.

To open an existing plan from the Plans drawer to view it, do the following:

1. In the Navigator, click a Supply Chain Planning work area link.
2. Click the Plans drawer.
3. Expand Plans, and select the plan of your choice.
4. Click the Actions button and select Open.

**Tip:** If you have many plans, you have an option to search a plan by using the Manage Plans task. In this case, provide appropriate search criteria and click Search. In the search results area, select your plan and click the Action button and select Open. Oracle recommends this method to view sales and operations plans.

### Enable Plans for OTBI Reporting

Oracle Transactional Business Intelligence (OTBI) is a real-time, self-service reporting solution that helps you create user-defined and interactive reports. You can enable OTBI reporting for plans created in your Supply Chain Planning work area to:

- Run reports in real-time to analyze supply, demand, and sales and operations planning plans
- Generate user-configurable and easy-to-use reports by using business intelligence tools and charts
- Analyze key metrics, such as exception metrics, inventory balances, pegged quantity, and orders to be released
- Compare two or more plans that are enabled for OTBI reporting

To improve your supply chain performance, you can monitor and identify problem areas by using strategic insights into live and operational data. Compare different scenarios in real-time by using key measures to decide the best course of action. You can respond to changes by modeling complex strategies and plans to analyze and compare them. You can also define native OTBI capabilities like alerts based on exception conditions, user-defined measures, and conditional formatting to monitor or track problem areas.

To create OTBI reports, navigate to the Oracle Fusion Reports and Analytics work area. You can build reports by using the base measures available in your Supply Chain Planning work area. You can also create user-defined measures based on the base measures by using the standard business intelligence tools.

To open OTBI reports in a Supply Chain Planning work area, save the OTBI reports into the Report Components subfolder within the Transactional Analysis Samples folder. The Report Components folder is located in the shared Supply Chain Planning folder in the Reports and Analytics work area.

To enable OTBI reporting for plans, you must do the following:

- Select the **Enable for OTBI reporting** check box on the Plan Options page of your supply, demand, or sales and operations plan.

  **Note:** You must run the plan after you enable it for OTBI reporting.

- Set up reporting hierarchies by configuring the Product and Time hierarchies in the dimension catalog named Reporting Catalog. To configure the Product and Time hierarchies, use the Configure Planning Analytics task in your Supply Chain Planning work area. Depending on the reports that you want to generate, move the Product and Time hierarchies from the Available Hierarchies pane to the Selected Hierarchies pane. If you select multiple Product and Time hierarchies, ensure that you select a default hierarchy for the Product and Time hierarchies. The default hierarchies are used by default in the predefined reports.

You can build reports by using the base measures available in your Supply Chain Planning work area. You can also create user-defined measures based on the base measures by using the standard business intelligence tools.
Accessing the OTBI Reports

Perform these steps to access the OTBI reports:

1. In a Supply Chain Planning work area, open a plan that is enabled for OTBI reporting.
2. Click the **Open** button and then select a pane.
3. In the Open Table, Graph, or Tile Set dialog box, do one of the following:
   - Search for your report.
   - Filter the list by selecting **Type** and then **Report**.
4. Select a report and then click **OK**.
   The OTBI report opens in the context of the current, open plan.

When you search for reports, the list of reports in the search results includes predefined reports and user-defined reports created by you. You must save the user-defined reports into the Reports Components subfolder within the Transactional Analysis Samples folder to make them available in the Supply Chain Planning work areas. The following predefined reports are available only in the Oracle Fusion Supply Planning and Oracle Fusion Planning Central work areas:

- Build Plan by End Item
- Exception Summary by Item Order
- Details by Item
- Pegging Details by End Item
- Plan Recommendations Summary Graph

Available Measures

The following measures are available in the Oracle Fusion Reports and Analytics work area:

- **Configure to Order Forecast Metrics**: The following configure to order forecast metrics are available for demand plans, and demand and supply plans:
  - Final Option Demand Forecast
  - Final Planning Percent
  - Option Demand Forecast
  Configure to order forecast metrics support dimensions, such as Plan, Time, Product, Organization, Customer, Top Model, and Demand Class.

- **Demand Management Metrics**: The following demand management metrics are available for demand plans, and demand and supply plans:
  - Bookings Forecast
  - Bookings History
  - Bookings History Value
  - Final Bookings Forecast
  - Final Shipments Forecast
  - Shipments Forecast
  - Shipments Forecast Value
Manage Sales and Operations Plans

- Shipments History
- Shipments History Value
  
  Demand management metrics support dimensions, such as Time, Product, Organization, Customer, and Demand Class.

- Exception Metrics: The following exception metrics are available for supply plans, and demand and supply plans:
  - Exception Count
  - Exception Quantity
  - Exception Days
  - Exception Ratio
  - Exception Value

  Exception metrics support dimensions, such as Plan, Time, Product, Organization, Customer, Supplier, Manufacturing Resource, and Exception Type.

- Order Metrics: The following order metrics are available for supply plans, and demand and supply plans:
  - Order Quantity
  - Implemented Supply Quantity
  - Order Value

  Order metrics support dimensions, such as Plan, Time, Product, Organization, Order Details, and Order Type.

- Pegging Metrics: The following pegging metric is available for supply plans, and demand and supply plans:
  - Pegged Quantity

  Pegging metric supports dimensions, such as Plan, Time, Product, Organization, Customer, Supplier, End Demand, and Order Type.

- Sales and Operations Planning Metrics: The following sales and operations planning metrics are available for sales and operations plans:
  - Consensus Forecast
  - Consensus Forecast Value
  - Final Sales Forecast
  - Final Sales Forecast Value
  - Sales Forecast
  - Sales Forecast Value

  Sales and operations planning metrics support dimensions, such as Plan, Time, Product, Organization, Customer, and Demand Class.

Define and Manage Plan Options
Define Scope Plan Options

Scope options determine the scope of the sales and operations plan. Define or modify scope plan options on the Create Plan page, Scope tab or the Edit Plan Options page, Scope tab. You can configure plan organizations, items, time horizon, and planning level for demand forecasting. You can also define the filters for a plan, such as the hierarchy, level, and level members.

On the Scope tab, indicate which dimension catalog to use for your sales and operations plans. The dimension catalog is a grouping of dimensions and hierarchies for use in plans. Use either the Default Catalog or create your own dimension catalog.

The Scope tab includes the following sections for sales and operations plans:

- Plan Organizations
- Plan Items
- Plan Parameters

Plan Organizations

Specify a hierarchy, level, and level members by which to filter the plan. Also, select the source system code to use for filtering organizations. Fields in the Plan Organizations section are required. If you select a level that is above the organization level, then the plan includes organizations that belong to that parent level.

Plan Items

Specify a hierarchy, level, and level members by which to filter specific items for demand planning. Your selections are used in conjunction with your selections in the Plan Organizations section. Items that belong to a parent level are included. Fields in this section are required for sales and operations plan types.

Plan Parameters

You can set up your sales and operations planning at a weekly or monthly level. For better performance, Oracle recommends that you run your sales and operations plans at a monthly level. If you run your plan at the weekly level for two years, you have 104 weeks worth of data. The processing engine must process a larger volume of data, which impacts performance. If you run your plan at the monthly level for two years, you have only 24 buckets, which means better performance.

The following table describes the plan parameters for sales and operations plan types.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan Horizon Days</td>
<td>Number of days in the plan. Set horizon days to forecast and plan for future needs. Minimize horizon days to avoid long-running plans. Default is 550 days.</td>
</tr>
<tr>
<td>Planning Calendar</td>
<td>Calendar used for forecasting and setting time level. The calendar must belong to the dimension catalog associated with the plan.</td>
</tr>
<tr>
<td>Planning Time Level</td>
<td>Planning time level that is used in a plan and is used by forecasting profiles. The sales and operations plan can be generated in weekly or monthly time buckets. Time levels vary, depending on the forecasting calendar that you select. Default value is Gregorian Month.</td>
</tr>
</tbody>
</table>
### Measure Catalog

**Definition:**
Group multiple sets of measures for use in a plan. By enabling only those measures that are needed for any specific plan, you can perform a focused analysis with improved performance. A planning administrator can create and modify measure catalogs. Default value is Default S&OP Catalog.

#### Price List

**Definition:**
Price list used in revenue calculations. The default price list for use in value calculations is Item List Price, defined in Items table for Organization and Item.

#### Exception Set

**Definition:**
Lists exceptions to compute as part of a plan and also filters on Organizations and Categories for computing exceptions.

#### Simulation Set

**Definition:**
Lists simulation sets to use in your plan. A simulation set is a set of adjustments to plan inputs. Apply a simulation set to a plan to model different business scenarios, such as increasing available resource capacity.

### Related Topics

- How You Use Dimensions and Dimension Catalogs in Supply Chain Planning
- Considerations for Setting Up Dimension Catalogs
- Configure Archiving Parameters

### Demand Plan Options

Use the Demand tab to define the demand plan options. Demand planning is a separate planning process from supply planning in many companies. Define or modify demand plan options on the Create Plan or Edit Plan Options page, Demand tab in a Supply Chain Planning work area.

### Forecasting Profile Options for Demand Plans

Demand plan options determine the forecasting profiles to include as part of a demand plan run. Define forecasting profile options for a demand plan in a Supply Chain Planning work area on the Plan Options page, Demand tab or the Edit Plan Options page, Demand tab. The Demand tab is not available for supply plan types.

In the Forecast Profiles region, select which forecasting profiles will be available for the demand plan run. You can also indicate the amount of historical data used for forecast generation. When you run the demand plan, the forecast profiles run in the specified order.

The demand planning engine can generate statistical demand forecasts at different time levels such as day, week, or month. Specify the time level in the Forecasting Time Level field on the Plan Options page, Scope tab.

**Note:** For sales and operations plans types, the demand planning engine can generate statistical demand forecasts at week or month time levels. You specify the time level in the Planning Time Level field on the Plan Options page, Scope tab.
Forecasting Profiles with Input Measures and Output Measures

In the Forecast Profiles region, specify which forecasting profiles to include as part of a demand plan. You cannot edit the input measure or output measure for a forecasting profile.

The following table lists the predefined forecasting profiles.

<table>
<thead>
<tr>
<th>Forecasting Profile Name</th>
<th>Input Measure</th>
<th>Output Measure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forecast Shipments</td>
<td>Final Shipments History</td>
<td>Shipments Forecast</td>
</tr>
<tr>
<td>Forecast Shipments Including Event Activity</td>
<td>Final Shipments History</td>
<td>Shipments Forecast</td>
</tr>
<tr>
<td>Forecast Bookings</td>
<td>Final Bookings History</td>
<td>Bookings Forecast</td>
</tr>
<tr>
<td>Forecast Bookings Including Event Activity</td>
<td>Final Bookings History</td>
<td>Bookings Forecast</td>
</tr>
</tbody>
</table>

Analysis Set

An analysis set is an optional criteria used to apply a forecasting profile to a subset of a plan.

- If you don’t select an analysis set, then the forecasting profile applies to the full scope of the plan.
- If you select an analysis set, then the forecasting profile will be applied to only the subset of the plan scope defined by the analysis set.

For example, you have an analysis set containing a specific set of products, and you select that analysis set for a forecasting profile. The forecast will be generated for the specific products included in both the analysis set and in the plan, instead of for all the products in the plan.

Historical Buckets

Define the amount of historical data to use during the forecasting process. The statistical demand forecasting process uses the number of buckets in this field to define the amount of historical data used.

The historical bucket substantially affects the demand forecast generated when you run the plan. Use at least 12 months of history, but 18 to 36 months of history is best practice. When setting the historical bucket, keep the following in mind:

- Very long history affects plan runtimes and makes the forecast less relevant to current demand patterns.
- Less than one year of history affects seasonal analysis. This includes both yearly seasonality and holiday impacts.

The historical bucket setting is a maximum amount of history used when generating a forecast. The actual amount depends on the data available for a given item and organization. For each item and organization, the forecasting process identifies all available historical data, removes any leading zero demand prior to the first positive demand point, and generates a forecast.
History Start and End Dates

The plan definitions drive the history start date. History end date is calculated based on the end date and historical buckets.

Forecast Buckets

Indicates how far into the future a demand forecast will be generated and is driven by the planning horizon set for the plan.

Locked Forecast Periods

Indicates the number of buckets from end of historical data that will not receive a new forecast when you run the demand plan.

Forecast End Date

Indicates the end date that a forecast will be generated when you run the plan. The end date is based on plan horizon and the current plan start date.

Define Supply Plan Options

For sales and operations plans, use the Plan Options page, Supply tab to set general and organization-specific supply planning options. Use the General subtab to specify the supply plan attributes, aggregate plan attributes, and supply constraints. The Organizations and Schedules subtab lists the organizations specified on the Scope tab and the demand schedules used to plan supply.

General

Supply Plan Attributes: Specify the supply plan attributes for the sales and operations plan.

- Select an assignment set.
- You can select the options to include purchase orders, transfer orders, work orders, or sales orders in the plan.

Aggregate Plan Attributes: Specify the aggregate plan attributes for the sales and operations plan.

- Planning Product Level: Specify the product level at which demands and the bill of resources are modeled in a plan. You can set the product level as either item or Category. Item is the default setting.
- Category Level Members: Specify which items are planned at the category level. To select members, you must select Category as the planning product level.
- Use Global Demand: Select to make the aggregate supply planning engine model demands globally. If selected, then also specify the planning customer level.

Or, deselect to create a network with demand modeled at fulfillment warehouse organizations without customer detail.

- Planning Customer Level: If you selected the Use global demand check box, then you can specify the customer dimension level to use for aggregate planning. Specify the level at which to model customer demand in your plan: Customer Site or Zone.

If you did not select the Use global demand check box, then the planning customer level is set to None.
Constraints: Specify the constraints for the sales and operations plans.

- **Allow lead time compression:** By default, the Allow lead time compression check box is selected. When the check box is selected, the lead time compression exceptions are generated in a plan run. If the check box is not selected, lead time constraints are enforced.

- **Consider supplier capacity constraints:** Select to enforce supplier item capacity constraints at a component category level by supplier location. You will still have visibility to the requirements for items within the category. You can also continue to generate supplier requirements for unconstrained component categories if you choose not to load available supplier capacity for those items.

- **Consider work center capacity constraints:** Select to enforce resource capacity constraints at the work center level. You will still have visibility to resource loading within the work center. If you select this check box, you can then select which work centers to constrain in manufacturing locations. You can also continue to generate resource requirements for resources in unconstrained work centers.

- **Constrained Work Center Level Members:** If you selected Consider work center capacity constraints, then you can also select the work center level members to constrain. The list of work centers is based on the selections made in the Plan Organizations section on the Plan Options page, Scope tab. If you do not select any work centers, then no resource capacity constraints are enforced.

**Organizations and Schedules**

**Organizations:** View organizations and their descriptions. The organizations are based on the organization level members specified on the Plan Options page, Scope tab.

**Demand Schedules:** View the demand schedules used to plan supply, which references the same plan name in a sales and operations plan.

- **Supply Plan Input:** Click the Select button to open the Supply Plan Input dialog box. In the Supply Plan Input dialog box, select an end item demand measure by which to drive supply planning. The following are the preconfigured measures that you can select, but you can also select a user-configured measure:
  - Approved Consensus Forecast: The final demand forecast determined by collaborative review that has received final approval for use in supply planning activities, expressed as a quantity.
  - Approved Final Bookings Forecast: The statistical demand forecast, based on bookings forecast demand stream that has been reviewed and received final approval for use in supply planning activities.
  - Approved Final Shipments Forecast: The statistical demand forecast, based on shipments forecast demand stream that has been reviewed and received final approval for use in supply planning activities.
  - Consensus Forecast: The weighted demand forecast that combines multiple stakeholder forecasts from sales, marketing, and operations, expressed as a quantity and including any planner adjustments. The unconstrained consensus forecast coming from the demand review process becomes the basis for developing a constrained operating plan.
  - Final Bookings Forecast: The bookings forecast, expressed as a quantity and including any planner adjustments.
  - Final Marketing Forecast: The marketing forecast based on user adjustments to the baseline marketing forecast, expressed as a quantity.
  - Final Sales Forecast: The final sales forecast including any user adjustments, expressed as a quantity.
  - Final Shipments Forecast: The final forecast based on shipment history, expressed as a quantity and including planner adjustments.

- **Measure Levels:** View the level at which the demand schedule is being consumed in Sales and Operations Planning.
Technical Control Parameters

When you enable this option, the planning process implements multithreading during the plan run. Multithreading decreases the overall run time of a plan. To enable this option, click **Select Advanced Options** in the General tab of a supply plan and select **Enable multithreading** on the Supply: Advanced Options dialog box.

Configure Supplier and Capacity Constraints

You can configure to constrain supplier capacity and resource capacity in a plan's options. With aggregate capacity planning, you can constrain resource capacity for specific work centers and constrain supplied component items at the product category level. You have the flexibility to decide which capacity constraints to enforce in your plans and which ones not to enforce. Configure these constraint parameters on the Plan Options page, Supply tab from the Sales and Operations work area.

You can configure supply constraints to enforce supplier category capacity and work center resource capacity for the critical component items and bottleneck resources used in your aggregate bill of resources. For example, if a supplier allocates a fixed amount of supply due to their own global constraints, or if a manufacturing facility cannot exceed a known level of output, then you can enforce these constraints in your sales and operations plans.

**Note:** In a constrained plan, capacity utilization cannot exceed 100 percent for constrained work centers or supplier component categories. However, overloading can still occur in a constrained plan for unconstrained resources and suppliers.

Exception management identifies where there are performance gaps. You can tailor predefined exceptions to your specific requirements and use them in exception sets.

Supplier Capacity

To enforce supplier capacity, select the **Consider supplier capacity constraints** check box in the Constraints section on the Plan Options page, Supply tab. The planning process constrains supplier capacity at the component category level, not for an individual component item. You still have visibility to supplier item loading within the component category.

When constraining component categories, specify available supplier capacity for all items in the category. If you do not want to constrain a component category in a constrained plan, then do not specify available supplier capacity for its items.

Supplier capacity overloading can still occur for supplied items in a constrained component category. The constraint is enforced at the component category level.

Resource Capacity

To enforce resource capacity, select the **Consider work center capacity constraints** check box in the Constraints section on the Plan Options page, Supply tab. The planning engine constrains resource capacity at the work center level, not for an individual resource. You still have visibility to resource loading within the work center.

You can select which work centers to constrain in manufacturing locations in plan options. You can also continue to generate resource requirements for resources in unconstrained work centers.
In a resource constrained plan, resource utilization cannot exceed 100 percent for constrained work centers. However, resource overloading can still occur for unconstrained work centers in the plan. An individual resource in a constrained work center can be overloaded. The constraint is enforced at the work center level.

Exceptions
Sales and Operations Planning provides predefined exceptions to use in constrained plans, such as Supplier Category Capacity Overloaded and Work Center Overloaded. These exceptions detect when capacity utilization for supplier component categories and work centers are fully loaded at 100 percent.

Run a Sales and Operations Plan
When you run a sales and operations plan, you can specify the scope of the plan that you want to run. For example, you can generate the demand forecasts or supply replenishments, or both. You can decide whether to refresh the plan's input data before running it. Also, you can run the plan immediately or you can run the plan in the background at a set time or on a repetitive schedule, such as daily or weekly.

After you create a plan, you must run the plan to generate the data. In the Run Plan dialog box, Parameters tab, options are sequenced in the order of operations: data refresh, scope, demand, and supply. The data refresh process runs first, then the forecasting process runs, and then the output is used for planning calculations. You can configure the following options for a sales and operations plan:

- Data Refresh Options
- Scope Options
- Demand Plan Run Options
- Supply Plan Run Options

Data Refresh Options
The following data refresh options are available:

- Do not refresh with current data: Select this option to run incremental what-if plan simulations. There is no advancement of the plan start date.
- Refresh with current data: Select this option to refresh the complete plan with the latest collected data and advance the plan start date. If you are running the plan for the first time, this is the only data refresh option available and it is selected by default.

If you select this option for a sales and operations plan, the Plan demand and Plan supply check boxes in the Scope Options section are selected by default and cannot be deselected.

Scope Options
Scope options restrict the focus of the replan. The following scope options are available:

- **Plan demand**: Select to forecast demand when running a plan. If you selected Refresh with current data in the Data Refresh Options section, then this option is selected by default.
- **Plan supply**: Select for the planning process to calculate the supply when running the plan. The Plan supply check box in the Scope Options section is available only when the Plan supply check box is selected on the Plan Options page, Supply tab. If not selected, then the aggregate planning engine is not invoked as part of the
plan run. If selected, and you also select the **Refresh with current data** check box in the Data Refresh Options section, then the Plan supply option is selected by default and cannot be deselected.

- **Archive plan**: Select to archive data after you run the plan. The Archive plan option is available when the Enable for archiving check box is selected in the Scope: Advanced Options dialog box, which you navigate to from the Plan Options page, Scope tab. If the plan is enabled for archiving, then the measures in the measure catalog specified in the Measure Catalog for Archival field will be archived.

### Demand Plan Run Options

Use Demand Plan Run Options to generate a demand forecast. Select the forecasting profiles that you want to include as part of the plan. If you do not select a forecasting profile, then the demand forecasting process does not run.

### Supply Plan Run Options

The following supply plan run options are available for sales and operations plans:

- **Interactive**: Select this option to run incremental what-if plan simulations. If you select Interactive, the Schedule tab is disabled and the plan is set to run as soon as possible. When the plan run completes, the plan is available for review.
- **Batch**: If you select Batch, the Schedule tab becomes available where you can select to run the plan immediately or set up a schedule for when to run the plan, such as weekly or monthly.

### Running a Sales and Operations Plan

To run a sales and operations plan:

1. Open the Run Plan dialog box:
   a. In the Navigator, click the Sales and Operations work area.
   b. Click the Plans panel tab.
   c. In the Tasks panel drawer, click the Manage Plans link.
   d. Enter the search parameters and click the Search button.
   e. In the Search Results region, select the plan that you want to run, click Actions, and then select Run.

2. In the Run Plan dialog box, Parameters tab, expand Details to review the plan options:
   a. In the Data Refresh Options section, review the options and make appropriate selections.

   **Note**: If you are running the plan for the first time, select **Refresh with current data**. This option refreshes historical data, imports sales orders, and advances the plan start date to align with the current date.

   b. In the Scope Options section, select the options that you want for the plan run.
   c. In the Demand Plan Run Options section, select the forecasting profiles that you want to include as a part of the plan run.
   d. In the Supply Plan Run Options section, select **Interactive** or **Batch**.

3. If you selected **Batch** in the Supply Plan Run Options section, click the Schedule tab to set up the frequency parameters:
   a. To run the plan immediately, select **As soon as possible**.
   b. To run the plan in the background at a set time, select **Using a schedule** and then select a Frequency, such as **Daily** or **Weekly**.
Compare Sales and Operations Plans

Compare a sales and operations plan with another sales and operations plan or an archive of the same plan. You can select a metric to show the difference between the plans.

Compare aggregate plan metrics: You can compare two plans and understand what changed at an aggregate level. For example, you can compare metrics, such as Revenue, Production Plan, Resource Requirements, Projected Available Balance, and Exceptions Count. The comparison of plans in a table or a graph displays the data for each plan side-by-side. To see the differences between the plans, you can select the metrics in the Comparison Options tab when creating or editing the table or graph. The Show Difference icon in the table or graph toolbar redraws the table or graph with the selected difference metrics.

The comparison metric options are the following:

- Difference
- Percent Difference
- Absolute Percent Difference

To compare a plan:

1. In the Navigator, click the Sales and Operations Planning work area.
2. From the Actions menu, select Compare and then click Plans.
3. In the Search and Select: Plan dialog box, search and select the plan that you want to compare with the current plan, and click OK.
   You can view the table or graph with both plans displayed.

   **Tip:** Click the Graph icon on the toolbar of the table to view the results in a graph.

4. Click Show Difference to view the difference between the current plan and the comparison plan.

To stop comparing the plans, select the Cancel Compare from the Actions menu.

Review Plan Messages

In Supply Chain Planning, you can view root causes for technical plan process failures and the recommendations to fix the issues.

After running a plan, open the Review Plan Messages table to review the warning and error messages generated by the planning processes, such as forecast generation and supply plan generation. You can also review the recommendations to address the warning and error conditions. Access the plan messages from either the Manage Plans page or the Edit Plan page.

Plan messages are available for all plan types (for example, Supply Plan or Sales and Operations Plan types) and are accessible from your respective Supply Chain Planning work area. There are three message types:

- Warning: Indicates an issue that can result in a future run plan error if not resolved.
- Error: Indicates a plan failure.
• Recommendation: Indicates a recommendation to resolve a plan failure or how to achieve a better run performance.

If you repeatedly run the plan, the same messages appear on the Review Plan Messages tab for each plan run. The messages will have different process identifiers and submission times.

You can delete plan messages based on the submission date. On the Review Plan Messages tab, click the Purge button. In the Purge Messages dialog box, enter a submission date with one of the operators: Equals, Before, On or before, After, On or after, Between, or Not between.

Use the following steps to open the Review Plan Messages table from the Manage Plans page:

1. From a Supply Chain Planning work area, click the Task drawer and select Manage Plans.
2. On the Manage Plans page, search for a plan.
3. In the Search Results region, select a plan.
4. Click the Actions list and then select Review Plan Messages to access the Review Plan Messages tab.

From the Search Results region, you can export the messages to a Microsoft Excel spreadsheet.

Use the following steps to open the Review Plan Messages table from the Edit Plans page:

1. From a Supply Chain Planning work area, click the Task drawer and select Manage Plans.
2. On the Manage Plans page, search for a plan.
3. In the Search Results region, select a plan. Next, click the Actions list and then select Open.
4. On the Edit Plan page, click Open.
5. In the Open Table, Graph, or Tile Set dialog box, search for the Review Plan Messages table. Select the table and then click OK.
6. On the Review Plan Messages tab, click the Search button.
7. In the Search Results region, view the plan messages.

From the Search Results region, you can export the messages to a Microsoft Excel spreadsheet.

Related Topics

• Overview of Supply Chain Planning Plan Types
10 Archive Plans

Plan Archival

Supply Chain Planning provides two archival types, one that a planner can run for a plan and another archive type that only an administrator with proper security privileges can set up for MAPE statistics. For a planner, plan archival enables you to archive measures in a plan with plan context and save multiple versions of a plan's archived measures over time. When you archive a plan, you archive a set of measures contained in the measure catalog that you chose as the archive measure catalog for the plan.

Note: You can create archives for demand, supply, integrated demand and supply, and sales and operations plans. Archival is not available for Oracle Planning Central Cloud.

Plan Archives

Plan archival enables you to save multiple versions of the plan where you archive the key measures at a point in time. The Waterfall Analysis and Trend Analysis tables and graphs use the plan archive to compare the current plan’s data to past versions of the plan. When viewing past versions of the plan, you can see the impact of strategic and tactical changes made to the plan. You can also compare the individual archives to the plan by selecting Compare > Archive from the Actions menu in a plan.

For example, you archive a plan in May and then market conditions in September cause adjustments to be made to the plan. You can analyze the impact of the adjustments on the plan by viewing the changes in the key performance indicators between the plan version archived in May and the current plan.

A Supply Chain Planning planner can run the archiving process from an open plan by selecting the Archive option from the Actions menu. A planner can also run the archiving process by selecting the Archive option on the Run Plan page. Alternatively, you can run the archive process independently of running the plan by selecting the Archive option from the Actions menu on the Manage Plans page.

Before you can archive a plan, you must enable the plan for archiving and set up the archiving parameters. The parameters that you configure determine the time hierarchy, time level, and the measure catalog to use for the archives. Set up the archiving parameters in the Scope: Advanced Options dialog box, which you navigate to from the Plan Options page, Scope tab.

MAPE Archives

An administrator with the correct security privileges can create an archive for MAPE statistics by running the Build Plan Archive scheduled process from the Tools work area. Generally, a planner does not have the privileges to create a MAPE archive. However, an administrator with the required privileges can see the Enable for MAPE calculations check box in the Build Archive dialog box. The administrator can create archives at a week or month level.

Note: To calculate predefined measures for demand plans and sales and operations plans that use archived data, you must use a MAPE archive. The statistics calculated for the MAPE archive are used to generate the Waterfall Analysis and Trend Analysis tables and graphs.
Configure Archiving Parameters

Before you can archive plans, you must enable the archiving options.

**Note:** You can create archives for demand, supply, integrated demand and supply, and sales and operations plans. Archival is not available for Oracle Planning Central Cloud.

To configure the archiving plan options:

1. In the Navigator, click a Supply Chain Planning work area link.
2. Click Manage Plans, select a plan, and then select Edit Plan Options from the Actions menu.
3. On the Scope tab, click the Select Advanced Options button.
4. In the Scope: Advanced Options dialog box, select Enable for archiving.
5. Review and make changes to the archive parameters:
   - Select the calendar to use, set the archive time level.
   - Select the measure catalog to use when archiving.
   - Note: Oracle recommends that you create a measure catalog containing only measures that provide insight to the plan’s changes instead of archiving every measure in the plan.
   - Select an option to automatically delete archives. This results in older archives being deleted automatically if they are older than the Most Recent Days to Keep parameter.
6. Click Done.

Overview of Archival for Calculating MAPE Statistics

A Supply Chain Planning administrator with the Manage Rolling Archives security privilege can create archives for the calculation of the MAPE statistics at a week or month level. These archives are used to calculate predefined measures for demand plans and sales and operations plans that use archived data. The administrator runs the Build Plan Archive scheduled process from the Tools work area.

Shipments or bookings measures are required in the archive for MAPE statistics calculations, based on the measure used to create the forecast. If your plan forecasts shipments data, then only the shipments forecast measures are needed. If your plan forecasts bookings data, then only the bookings measures are needed. The following shipments or bookings measures are required:

- Final Shipments Forecast
- Final Shipments Forecast 3 Months Ago
- Final Shipments Forecast 3 Months Ago Latest Archive
- Final Bookings Forecast
- Final Bookings Forecast 3 Months Ago
- Final Bookings Forecast 3 Months Ago Latest Archive

To use the archives in a waterfall or trend analysis, select the Use MAPE calculations check box in the Selector Tool Comparison Options tab.
MAPE archives created on a rolling basis can be referenced in a user-defined measure expression that uses the Archive function. The archive type is a parameter of this function. The valid values for archive type are "Rolling" and "Adhoc."

Archival for Calculating MAPE Statistics

A Supply Chain Planning administrator with the Manage Rolling Archives security privilege can create archives for the calculation of the MAPE statistics at a week or month level.

Perform the following steps to run the Build Plan Archive schedule process:

1. In the Navigator, under the Tools section, click the **Scheduled Processes** link to access the Scheduled Processes page.
2. Access the Process Details page for the Build Plan Archive process:
   a. On the Schedule Processes page, click the **Schedule New Process** button.
   b. In the Schedule New Process dialog box, click the **Name** list, and then click the **Search** link.
   c. In the Search and Select: Name dialog box, enter Build Plan Archive and click **Search**.
   d. Select Build Plan Archive and click **OK** to return to the Schedule New Process dialog box.
   e. In the Schedule New Process dialog box, click **OK**.
3. In the Process Details dialog box, select the plan to archive and then click the **Advanced** button.
4. On the Parameters tab, select Do not delete archives or Delete archives automatically.
   If you select to delete archives automatically, enter a number in the Most Recent Days to Keep field. The archive process automatically deletes older archives based on this parameter.
5. Select the **Enable for MAPE calculations** check box and enter or select the following parameters:
   a. **Archive Time Hierarchy**: Select the calendar to use for the archive.
   b. **Archive Time Level**: Select the time level to use for the archive.
   c. **Measure Catalog for Archival**: Select the measure catalog to use when archiving.
   
   **Note**: Oracle recommends that you create a measure catalog for archived measures instead of archiving every measure in the plan.
   d. **Use default archive name**: Select to use the default archive name.
   e. **Use user-defined archive name**: Select to overwrite the default name with a user-defined name.
6. Click the Schedule tab to set up the frequency parameters.
   o To run the plan immediately, select **As soon as possible**.
   o To run the plan in the background at a set time, select **Using a schedule**. Next, select a **Frequency**, such as **Monthly** or **Weekly**, to create MAPE rolling archives for use in waterfall and trend analyses.
7. Click **Submit**.

Delete Archives

A planner can automatically delete plan archives by setting parameters in the Scope: Advanced Options dialog box, accessed from the Plan Options page, Scope tab. Only a Supply Chain Planning administrator with the Manage Rolling Archives security privilege can delete MAPE archives. In the Tools work area, the administrator can use the Delete Plan
Archive schedule process to clean up unwanted archived data versions. You can delete the archives of a plan based on an archive version, a time range, or all archives for a plan.

Note: When you use the Delete Plan action, the process not only deletes the plan, but it also deletes all of the archive versions associated with that plan.

Perform the following steps to run the Delete Plan Archive schedule process:

1. In the Navigator, under the Tools section, click the Scheduled Processes link to access the Scheduled Processes page.
2. Access the Process Details page for the Delete Plan Archive process:
   a. On the Schedule Processes page, click the Schedule New Process button.
   b. In the Schedule New Process dialog box, click the Name list, and then click the Search link.
   c. In the Search and Select: Name dialog box, enter Delete Plan Archive and click Search.
   d. Select Delete Plan Archive and click OK to return to the Schedule New Process dialog box.
   e. In the Schedule New Process dialog box, click OK.
3. In the Process Details dialog box, select the plan that you want to delete the archives for and then click the Advanced button.
4. On the Parameters tab, in the Plan section, select one of the following options, which are only available to administrators with the Manage Rolling Archives security privilege:
   a. Include MAPE archives
   b. Delete MAPE archives only
5. On the Parameters tab, in the Archive Parameters section, configure the following parameters:
   a. Archives to delete
   b. Delete archives with time range

The Delete Plan Archive process filters the selected archive parameters by which MAPE archiving option you selected in the Plan section.
6. Click the Schedule tab to set up the frequency parameters.
   a. To run the plan immediately, select As soon as possible.
   b. To run the plan in the background at a set time, select Using a schedule and then select a frequency, such as Monthly or Weekly.
7. Click Submit.
11 Simulations and Simulation Sets

Overview of Simulations

You can perform simulations directly in a sales and operations plan. Make demand and supply changes in a sales and operations plan and run the plan. You can then analyze plan output coming from these changes.

You can make adjustments to editable measures and entity attribute values within the same plan, or make a plan copy that references a base plan. When you make a copy, you can use the plan comparison feature to analyze the differences between plan runs.

If you use the same plan to simulate plan changes rather than making a copy, use the Archive plan action to create an ad hoc archive. Then, use plan comparison to analyze the differences between the plan and the archived version.

Overview of Simulation Sets

Simulation sets provide a way to override key parameters coming from plan inputs. You can make these edits directly in a simulation set. Some examples of the types of edits are item prices and lead time, and component usage and effective dates in the bill of resources. You can also save plan edits made to attribute values by copying these changes to a simulation set.

For Sales and Operations Planning, the following tables are relevant for simulation sets:

- Aggregate Bill of Resource
- Items
- Resources
- Suppliers

Additionally, you can access the Resource Availability and Supplier Capacity tables from the Resources and Suppliers tables, respectively.

Create a Simulation Set

Perform the following steps to create a simulation set from the Plan Inputs work area:

1. In the Navigator, click the Plan Inputs work area link.
2. On the Plan Inputs page, click the Open button and select: Full Pane.
3. In the Open Table, Graph, or Tile Set dialog box, do the following:
   a. In the Search drop-down list, select: Name.
   b. In the Search text box, enter the name of a table, such as Items or Resources.
   c. Click the Search icon button.
   d. Select the Items table and click OK.
4. On the Plan Inputs page, Items tab (or Resources tab), click the Search button.
5. In the Search Results region, select one or more rows and do the following:
   a. Click **Actions** and then select **Add to Simulation Set**.
   b. In the Add to Simulation Set dialog box, click the **Search: Simulation Set** down arrow for a list of values, and then click **Create Simulation Set**.
   c. In the Create Simulation Set dialog box, in the **Simulation Set** field, enter the name of the simulation set you want to create.
   d. Click **Save and Close**.
   e. In the Add to Simulation Set dialog box, click **Save and Close**.

**Related Topics**
- Overview of Simulation Sets
- Simulations in Supply Planning
- Copy Data to Simulation Sets in Supply Planning
- Add Data from Plan Inputs to Simulation Sets

**Edit a Simulation Set**

Perform the following steps to edit a simulation set from the Plan Inputs work area:

1. In the Navigator, click the Plan Inputs work area link.
2. On the Plan Inputs page, click the Plans panel tab.
3. In the Plans panel drawer, do the following:
   a. Expand the list of Simulation Sets.
   b. Select a simulation set, right-click on it and select **Open**.
4. On the Simulation Set page, click **Open** and then select **Full Pane**.
5. In the Open Table, Graph, or Tile Set dialog box, select a table, such as **Resources** or **Items**, and then click **OK**.

On the Simulation Set page, a new tab opens for the table that you selected, such as the Resources tab or the Items tab.

6. In the Search region, click **Search**.
7. In the Search Results region, select one or more rows. Click **Actions** and then select **Edit** from the drop-down list.

8. In the edit dialog box, you can edit some of the attributes and drill down to additional tables, depending on the table that you accessed. For example:
   - For the Resources table, you can change the Bottleneck value. You can also drill down to the Resource Availability table.
   - For the Items table, you can change the Processing Lead Time value. You can also drill down to the Suppliers table.
9. When done, click **OK** to return to the Simulation Set page. Changed rows and fields are marked with small colored dots.

**Related Topics**
- Overview of Simulation Sets
Edit a Simulation Set from a Spreadsheet

You can download simulation set data into a spreadsheet, make edits, including certain updates, additions, and deletions, and then upload it back to the simulation set. In the Plan Inputs work area, while working with the Items or Supplies and Demands table in a simulation set, use the Edit in Spreadsheet option in the Actions menu to download the table rows into a Microsoft Excel file.

**Note:** Before working with spreadsheets, you must download and install the desktop integration installer that is available under Navigator > Tools. Otherwise, you can't download information into or upload information from spreadsheets.

To edit the data in the Items or Supplies and Demands table of the simulation set in a Microsoft Excel spreadsheet, follow these steps:

1. In the Plan Inputs work area, click the Plans panel tab.

   **Note:** The simulation set can also be edited from the Planning Central, Sales and Operations Planning, and Supply Planning work areas. However, the Supplies and Demands table is available in the simulation set only when it is edited in the Supply Planning work area.

2. In the Plans panel drawer, do the following:
   a. Expand the list of simulation sets.
   b. Select the simulation set that you want to edit, right-click, and click Open. The simulation set opens.

3. In the Open menu, select Full Pane. The Open Table, Graph, or Tile Set dialog box opens.
4. Select the Items or Supplies and Demands table, and click OK. The table opens in a page in the simulation set.
5. Perform a search for the table rows in the simulation set.
6. In the Actions menu for the table, click Edit in Spreadsheet. A dialog box opens and prompts you to save or open a Microsoft Excel file.
7. Open the spreadsheet. The Connect dialog box opens and prompts you to connect to the URL for the application.
8. Click Yes. A dialog box opens and prompts you to type your credentials.
9. Sign in with your Oracle Applications Cloud credentials. The spreadsheet is refreshed with the data in the simulation set.
10. Edit the data.

<table>
<thead>
<tr>
<th>Task</th>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>To add an item to the Items table of the simulation set</td>
<td>Click the Add Item icon in the Items menu of the spreadsheet, and provide values in the Add Item dialog box that opens. You can add an existing item or create an item that is based on an existing item.</td>
</tr>
<tr>
<td>To create an order in the Supplies and Demands table of the simulation set</td>
<td>Click the Create Order icon in the Supplies and Demands menu of the spreadsheet, and provide values in the Create Order dialog box that opens. (Not applicable to sales and operations planning.)</td>
</tr>
<tr>
<td>To edit a row</td>
<td>Modify the values in the row cells that are not grayed out. A symbol appears in the cell under the Changed column for the row.</td>
</tr>
</tbody>
</table>
### Simulations and Simulation Sets

<table>
<thead>
<tr>
<th>Task</th>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>To delete a row: Click the corresponding cell in the Mark for Deletion column. A symbol appears in the cell to mark the table row for deletion. To deselect the row, click the cell again.</td>
</tr>
</tbody>
</table>

11. Click the **Upload** icon in the **Items** or **Supplies and Demands** menu. In the Upload Options dialog box that appears, select the check boxes for the options that you want to use, and click **OK**. The data is uploaded to the simulation set.

12. Save the simulation set. The changes are displayed and marked with colored symbols.

13. Save and close the spreadsheet.

### Simulate Statistical Demand Forecast

The Statistical Demand Forecast generates demand forecasts coming from overrides made to demand history. This simulation projects future demand at aggregate time levels by using actual and adjusted history.

To simulate statistical demand forecast, do the following:

1. Save data changes in your plan and then select the Run Plan action.
2. In the Run Plan dialog box, do the following:
   a. In the Data Refresh Options section, select Do not refresh with current data.
   b. In the Scope Options section, select Plan demand.
   c. In the Demand Plan Run Options section, select Forecast Shipments.
   d. In the Supply Plan Run Options section, select Interactive.
3. Click OK to run the plan.
4. Run the plan.

### Simulate Changes to Demand and Supply

In Sales and Operations Planning, you can simulate the effects of edits to a plan and analyze the supply changes in the plan output. You can model supply scenarios to accommodate an increase in demand or see the impact of changes to any of these supply parameters:

- Resource availability for a planning resource in an organization
- Supplier capacity available for a supplier item
- Supplier cost to evaluate changes in purchasing cost
- Item prices to evaluate changes in revenue
- Item lead times
- Safety stock to evaluate changes in projected inventory
- Sourcing percentages to simulate changes in both purchasing and shipping costs and capacities
- Usage quantities and effective dates in bill of resources
Simulating Changes to Demand Forecasts

You can make manual adjustments to demand forecasts as part of a collaborative forecasting process. For example, a difference in value between the Sales Forecast and the Consensus Forecast might necessitate an override to the Adjusted Consensus Forecast measure.

Simulating Changes to Resource and Supplier Availability

You can simulate changes in available resource capacity by editing the Resource Availability measure. For example, you can increase resource availability by adding an extra shift.

You can simulate changes in available supplier capacity by editing the Supplier Capacity Available measure. For example, you can increase component item availability for a supplier.

Simulating Changes to Bill of Resources

Within a plan, you can edit usage quantities and effective dates for an Organization and Assembly Item combination in the Bill of Resources. If you copy to a simulation set after making edits to a bill of resources in the plan, select all of the bill of resources rows to copy.

You can edit a bill of resources for an Organization and Assembly Item combination in a simulation set. However, beforehand, you must add all of the rows for the loaded bill of resource to the simulation set from the Plan Inputs work area.

Within a simulation set, you can also add records to simulate adding a new component to a bill of resources for engineering or design reasons. You can reference a simulation set for a plan in Plan Options.

You must run a plan with the Refresh with current data option to overlay bill of resources changes made in or copied to a simulation set. Before you run the plan, associate the simulation set to the plan in Plan Options.

Simulating Changes to Item Price, Item Cost, and Lead Time

You can simulate changes in item price by editing the Adjusted Price measure in a table and rerun the plan. For example, you can evaluate the potential revenue coming from a price increase before changing the actual price. You can also edit the Selling Price in a simulation set in the Items table to overlay in a plan.

You can edit the Standard Cost in the Items table in a plan. You can also edit the Standard Cost in a simulation set in the Items table to overlay in a plan. You can also edit the Adjusted Supplier Cost measure in a table, such as the Supplier Plan by Month table.

You can edit the Preprocessing Lead Time, Processing Lead Time, and Postprocessing Lead Time in a simulation set in the Items table to overlay in a plan. Next, run the plan to evaluate lead time changes.

Simulating Changes to Safety Stock

You can override item safety stock levels by editing the Adjusted Safety Stock measure in a table and then rerun the plan to simulate the changes. For example, you can determine the impact on Carrying Cost measure changes that would arise due to changes in inventory levels represented by the Projected Available Balance measure.
Simulating Changes to Sourcing Allocation Percentage

Use the preconfigured Sourcing Allocation table for simulating changes to sourcing rule allocation percentages modeled by the Sourcing Allocation Percentage measure.

Simulating Supply Scenarios: Procedures

To simulate supply scenarios in a plan, do the following:

1. Save data changes in your plan and then select the Run Plan action.
2. In the Run Plan dialog box, do the following:
   a. In the Data Refresh Options section, select Do not refresh with current data.
   b. In the Scope Options section, select Plan supply.
   c. In the Supply Plan Run Options section, select Interactive.
3. Click OK to run the plan.
4. Run the plan.

To simulate supply scenarios in a simulation set, do the following:

1. Save data changes in your simulation set.
2. Associate the simulation set to a plan in Plan Options and then select the Save and Run action.
3. In the Run Plan dialog box, do the following:
   a. In the Data Refresh Options section, select Refresh with current data.
   b. In the Supply Plan Run Options section, select Batch.
4. Click OK to run the plan.
5. Run the plan.
Glossary

dimension
A data category used to organize business data for retrieval and preservation of values. Dimensions usually contain hierarchies of related members grouped within them. A dimension categorizes and describes measure data. For example, a measure named Price might be categorized by Product and Time, so that the price of items can be tracked over time.

measure
Contains data that is organized by the measure's dimensions. For example, measures named Price and Forecast with the dimensions Product and Time would contain price data and forecast data for each product and time period.

planning data repository
The set of data collected from source systems and stored for use by order management, order promising, and supply chain planning processes.

Selector Tool
A user interface within supply chain planning work areas used to select measures, hierarchy levels, and dimension members. Used when creating and editing tables, graphs, analysis sets, and infotiles.

work area
A set of pages containing the tasks, searches, and other content you need to accomplish a business goal.