Oracle Fusion Cloud SCM

Using Supply Chain Collaboration

23D

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23D

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1 Introduction

Supply Chain Collaboration Introduction

Overview of Supply Chain Collaboration

Oracle Supply Chain Collaboration is a collaboration platform that manages cross-company planning and execution processes for Oracle Fusion Cloud Supply Chain & Manufacturing. You use Supply Chain Collaboration with Oracle SCM Cloud Services to get timely updates from your key suppliers and contract manufacturers on important supply chain decisions.

Supply Chain Collaboration supports the following processes:

- Supply collaboration to collaborate on order forecasts with tier 1 and tier 2 suppliers. The supply chain planners publish order forecasts to suppliers. The suppliers can view and analyze the order forecasts and commit to supply the requested item quantities over the planning horizon. The collaboration planners can review and adjust the supplier's commits if necessary. The commits flow to Oracle Planning Central or Oracle Supply Planning, where they're used as supplier capacity.

- Contract manufacturing collaboration to share supplier's (contract manufacturer's) production progress. The suppliers can also view previously submitted updates for their projects. Once uploaded, production reports are automatically submitted to Oracle Fusion Cloud Manufacturing, and the completion status and materials usage status of the contract manufacturing work order is updated.

- Vendor-managed inventory (VMI) enables the supplier to manage items that are located at the buyer's location. You can share on-hand quantities with the supplier, establish minimum and maximum inventory thresholds, and alert the supplier to items requiring replenishment. Suppliers can initiate the replenishment process, which can then be automated by the enterprise using Oracle Fusion Cloud Procurement.

- Business to Business (B2B) message monitoring to see the number of failed or undelivered messages. You can monitor messages for all processes, including order-to-cash and source-to-settle. The administrators can investigate the details and reprocess the failed messages when appropriate.

Supply Collaboration

Overview of Supply Collaboration

You can use the Supply Chain Collaboration work area to view open collaboration tasks and monitor order forecast commit status. You can also view exceptions that potentially need attention.

In the Oracle Supplier Portal Overview work area, suppliers can participate in supply collaboration by reviewing and responding to order forecasts.

Use supply collaboration to:

- Publish supply plans from Oracle Planning Central or Oracle Supply Planning, which can be analyzed and shared with suppliers as order forecasts. You can collaborate on supply plans published from Planning Central

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or Supply Planning using organizations and items defined within the Oracle Fusion product data model or items and organizations defined in Supply Planning imported from an external source system.

> **Note:** A supply plan that's partly defined in an Oracle application and partly in an external system isn't supported.

For more information on collecting planning data from others and external source systems, see the Using Supply Planning guide.

- Allow suppliers to view and analyze the order forecasts and commit by using Supplier Portal, Business to Business (B2B) messaging, or web services.

- Allow Supply Chain Collaboration Planners to review all published forecasts and commits by using the Manage Order Forecasts and Commits page.

- Manage exceptions by using the Supply Chain Collaboration work area. The exceptions may be due to:

   - Past due commits, where the supplier hasn't committed by the agreed commit due date established in the Service Level Agreement (SLA).
   - Forecast changes, where the current cycle forecast quantity has changed from the previous cycle.
   - Commit mismatches, where the committed quantity is less than the forecast quantity for a given date.

- Manage a trading partner network by using the Manage Supply Collaboration Network page.

Related Topics
- Supply Collaboration User Roles

Supply Collaboration Components

The supply collaboration process provides you with a seamless flow of information by bringing together supply planning, order forecasts, and supplier commits.

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This figure provides an overview of the supply collaboration components:
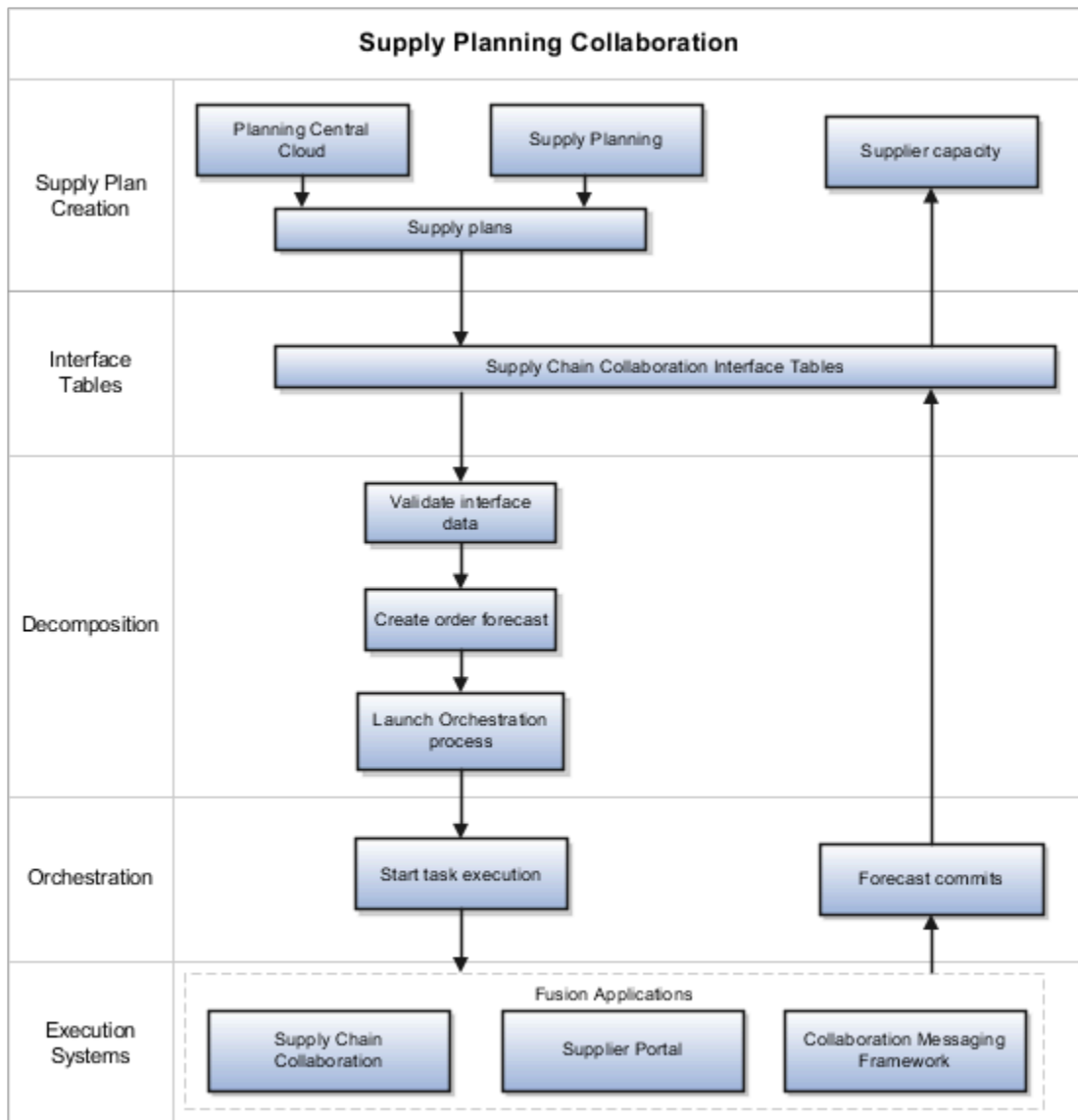
Based on the process and actions performed, the supply collaboration components are:

- Decomposition
- Orchestration
- Execution systems

The following table describes the supply collaboration components, the internal processes, and the corresponding actions.

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Supply Collaboration Components	Internal Process	Actions
Supply plan creation applications	Supply plans are created in Oracle Supply Planning or Oracle Planning Central. The Publish Order Forecast scheduled process filters the supply plan data by: • Supply plan • Organization for supply planning • Planner, which is the Supply Demand Planner ID • Category • Item, which is the enterprise item ID • Supplier • Supplier site	• Record the supply plans in the Supply Planning tables • Record the supply plan data in the Supply Chain Collaboration interface tables after the scheduled process is run
Interface Tables	The data is ready for collaboration.	Store supply forecast and commit data in the Supply Chain Collaboration interface tables
Decomposition	The Supply Collaboration Decomposition scheduled process: • Reads the payloads from the interface tables • Evaluates forecast exceptions • Creates or updates an order forecast, used by Supply Chain Collaboration to publish to suppliers • Assigns and launches the orchestration process Order forecast quantities are sent and stored in daily time buckets. However, they're displayed in weekly, monthly, or period aggregations.	• Create order forecasts • Update order forecast mid-cycle • Launch orchestration process
Orchestration	Orchestrates supply by: • Assigning an orchestration process and starting orchestration • Running the determined business process • Grouping Business to Business (B2B) messages by supplier site per plan	• Publish forecasts to Oracle Supplier Portal and Supply Chain Collaboration • Send B2B messages
Execution systems	Suppliers use the Supplier Portal to process commits for the order forecasts received from Supply Chain Collaboration. Collaboration planners use the Supply Chain Collaboration to process commits on behalf of suppliers.	• Supplier provides commits • Contract Manufacturer reviews order forecasts for their upstream suppliers • Collaboration planner reviews order forecasts and provides commits

The entities that are created and managed during collaboration are:

- Supply plans: Contain the supply orders created for a supply request, which are published to Supply Chain Collaboration. These plans are created in Supply Planning or Planning Central.

- Collaboration plans: Contain the order forecasts based on the supply plans that are eligible for collaboration for a specified collaboration period. These plans are created in Supply Chain Collaboration.

- Order forecasts: Contain the forecast and commit quantities by the suggested date that's used to create the time bucket.

Supply Collaboration Flow

The supply collaboration process flow includes the following steps:

1. A Supply Chain Planner uses Oracle Fusion applications, such as Oracle Supply Planning or Oracle Planning Central to create supply plans. The supply plans can use organizations and items defined within the Oracle Fusion product data model or imported from an external source system.
2. The Supply Chain Planner decides which supply plan data to send to Oracle Supply Chain Collaboration. The data can be filtered by attributes such as suppliers, items, and so on.
3. Supply Chain Collaboration receives the supply plans and stores the supply plans in interface tables.
4. Supply Chain Collaboration decomposition process decomposes the supply plans and creates order forecasts.
5. The orchestration process publishes the order forecasts to the suppliers through Oracle Supplier Portal, B2B Messaging using Oracle Fusion Collaboration Messaging Framework, or web services.
6. The Supply Chain Collaboration Planners and the Supplier Demand Planners can view the open collaboration tasks.
7. The Supply Chain Collaboration Planners and the Supplier Demand Planners can view the exceptions that potentially need attention arising due to various reasons, such as past due commits, forecast changes, and forecast commit mismatches.
8. The Supplier Demand Planners can review each time bucket request and commit to supply the requested item quantity in Supplier Portal. The Supply Chain Collaboration Planners can search and view all the published order forecasts and commits on the Manage Order Forecasts and Commits page. The Supply Chain Collaboration Planners can also update order commits on behalf of a supplier.
9. The orchestration process triggers decomposition of the order commits from suppliers and stores the order commits in interface tables.
10. The Supply Chain Planners can pull supplier commits back into Supply Planning or Planning Central Cloud Service as supplier capacity.

Related Topics
- Publish Order Forecast
- Supply Collaboration User Roles
- Receive Supplier Commits

Supply Collaboration User Roles

Here are the supply collaboration user roles:

User Role	Description
Supply Chain Planner	• Manages supply plans in Oracle Planning Central or Oracle Supply Planning • Releases order forecasts to suppliers requesting order commits
Supply Chain Collaboration Planner	• Reviews order forecasts and supplier commits • Reviews and manages exceptions around supply planning commits • Updates commits on behalf of a supplier
Supplier Demand Planner	• Reviews order forecasts • Provides commits to order forecasts using supplier portal, collaboration messaging, or direct web services
Supply Chain Application Administrator	• Manages supply collaboration network • Manages collaboration plans • Manages collaboration planners • Defines aggregation schedules • Enables and reviews Business to Business (B2B) messages
Supply Chain Integration Specialist	• Uses the Export Collaboration Order Forecasts scheduled process

Contract Manufacturing Collaboration

Overview of Contract Manufacturing Collaboration

Contract manufacturing collaboration enables suppliers and the original equipment manufacturers to manage production reports and manufacturing transactions.

Related Topics
- Contract Manufacturing Collaboration User Roles

Contract Manufacturing Collaboration with Suppliers

The contract manufacturing collaboration process enables suppliers (contract manufacturers) to manage production reports.

In the Oracle Supplier Portal Overview work area, the supplier can:

- Navigate to the collaboration area and upload production reports to update manufacturing progress. The transactions uploaded by the supplier are automatically submitted to manufacturing so that the completion status and materials usage status of the contract manufacturing work order can be updated.

- Search and view completed production reports for their assigned purchase orders.

Contract Manufacturing Collaboration with Original Equipment Manufacturers

The contract manufacturing collaboration process enables the original equipment manufacturers (OEM) to track contract manufacturer's manufacturing progress.

OEM can navigate from Oracle Supply Chain Collaboration, the Supply Chain Collaboration work area or Oracle Supply Chain Orchestration, the Supply Lines Overview work area to:

- Search for and view the supplier-provided updates for the in-progress contract manufacturing purchase orders.
- Resubmit a report to manufacturing if the automatic submission fails.

Contract Manufacturing Collaboration Flow

The contract manufacturing collaboration process flow includes the following steps:

1. The Supply Chain Operations Manager can view the contract manufacturing production reports submitted by suppliers (contract manufacturers) in Oracle Fusion Supply Chain Collaboration, the Supply Chain Collaboration work area or in Oracle Fusion Supply Chain Orchestration, the Supply Lines Overview work area.
2. The Supply Chain Operations Manager can view the supply orders that are in jeopardy and navigate to the manufacturing application to view the details of the supply order.
3. The Supply Chain Operations Manager can contact the supplier for more information about the supply order in jeopardy.
4. The Supplier Inventory Manager can navigate to the Manage Production Reports page to upload production reports to update manufacturing progress in Oracle Fusion Cloud Manufacturing.
5. The Supply Chain Operations Manager can view the updated production report by using Supply Chain Collaboration or Supply Chain Orchestration.

Related Topics
- Contract Manufacturing Collaboration User Roles

Contract Manufacturing Collaboration User Roles

The following table describes the contract manufacturing collaboration user roles:

User Role	Description
Supply Inventory Manager	This role is assigned to suppliers (contract manufacturers) to: • Access Oracle Supplier Portal • View summary reports

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User Role	Description
	• Navigate to the collaboration area and provide manufacturing or production report updates
Supply Chain Operations Manager	This role is assigned to original equipment manufacturers (OEM) to: • View supplier-provided updates for the in-progress contract manufacturing purchase orders

Vendor-Managed Inventory

Overview of Vendor-Managed Inventory

Vendor-managed inventory (VMI) is a supply chain management strategy in which a supplier manages items that are located at the buyer's location. You can use the Oracle Supply Chain Collaboration work area to view vendor-managed inventory tasks.

In Supply Chain Collaboration work area, enterprise users such as a vendor-managed inventory analyst can view VMI replenishment item status and supplier-initiated replenishment requests. Supply chain application administrators can manage the VMI network and VMI analysts.

In the Oracle Supplier Portal work area, suppliers can monitor on-hand quantities and replenishment status for the items they manage. If enabled, suppliers can also initiate the replenishment process by creating replenishment requests and adjust minimum and maximum inventory thresholds.

You can use the vendor-managed inventory features to:

- Allow suppliers to view and analyze on-hand quantities by using Supplier Portal or Vendor-Managed Inventory Items REST service.
- Share enterprise determined minimum and maximum inventory thresholds or even allow the supplier to manage these thresholds using Supplier Portal or Vendor-Managed Inventory Items REST service.
- Allow suppliers to initiate the replenishment process by submitting replenishment requests using Supplier Portal or Vendor-Managed Inventory Replenishment Requests REST service.
- Provide visibility to the entire replenishment life cycle for items managed by the supplier using Supplier Portal.
- Allow a VMI analyst to monitor the replenishment status of all replenishment items and supplier-initiated replenishment requests using the Manage Inventory page or web services.
- Allow a supply chain application administrator to manage VMI relationships by using the Manage VMI Network page or Vendor-Managed Inventory Relationships REST service.
- Allow a supply chain application administrator to manage VMI analysts by using the Manage VMI Analyst page or Vendor-Managed Inventory Analysts REST service.

Vendor-Managed Inventory Components

Vendor-managed inventory (VMI) provides visibility into the entire replenishment process. VMI enables the supplier or the enterprise user to own inventory planning and replenishment creation activities.

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Based on the process and actions performed, VMI tasks are performed in the following product work areas:

- Oracle Fusion Cloud Supply Chain Collaboration
- Oracle Fusion Cloud Procurement
- Oracle Fusion Cloud Inventory Management
- Oracle Fusion Cloud Financials

VMI When Supplier Owns Inventory Planning and Replenishment

This figure provides an overview of VMI when a supplier owns inventory planning and replenishment:

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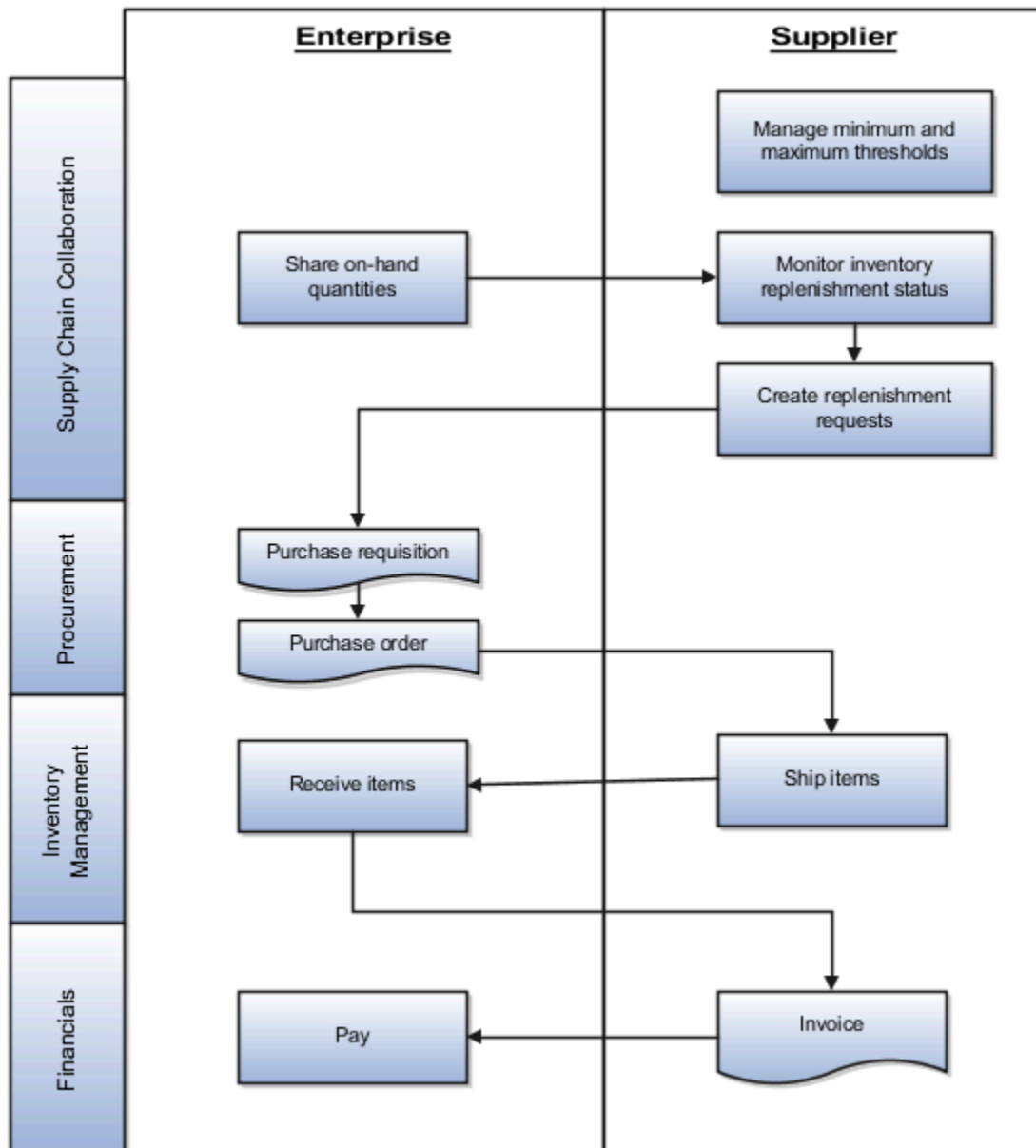
> **Note:** The process illustrates the supplier as the min-max quantity source. However, this process also supports the enterprise as the min-max quantity source. Min-max quantities can be manually updated or automatically calculated using the Calculate Min-Max Planning Policy Parameters scheduled process. For more information, see the Oracle Supply Chain Management Using Inventory Management guide.

Work Areas	VMI Process	Actions
Supplier Portal	Supplier updates the item's minimum and maximum quantities	Suppliers provide minimum and maximum thresholds
Inventory Management	Enterprise maintains on-hand quantities in Inventory Management	Share on-hand quantities with suppliers and VMI analysts
Supplier Portal	Calculate replenishment status using on-hand quantities and minimum and maximum thresholds	Suppliers create replenishment requests
Supply Chain Collaboration	Replenishment request is transformed into an externally managed purchase requisition using the Purchase Request web service	NA
Procurement	Based on a blanket purchase agreement, a purchase order is generated from the requisition, either automatically or manually	Create and approve the purchase order If the requisition is not automatically converted into a purchase order. You can search for requisitions requiring manual processing, using the Process Requisitions and View Requisition Lines tasks. Enterprise users can find the number of the generated purchase requisition using the Manage Replenishment Requests page in the Supply Chain Collaboration work area.
Supplier Portal	Purchase order awaits shipment	Supplier creates an advanced shipment notice (ASN) Supplier ships the product
Inventory Management	Enterprise receives the shipment and delivers the items	Create a receipt notice
Supplier Portal	Supplier creates an invoice or enterprise can generate the invoice on behalf of the supplier	Supplier creates an invoice
Financials	Enterprise pays supplier	Enterprise creates a payment notice

Supplier Inventory Planning Owner Flow

The VMI process flow when a supplier owns inventory planning and replenishment includes the following steps:

1. Depending on who the min-max quantity source is for an item, the enterprise user or the supplier sets the minimum and maximum quantities for the item. If enterprise and VMI relationship scope is organization, min-max quantities are set on the item record. If enterprise and VMI relationship scope is subinventory, min-max quantities are set at the item subinventory. If supplier, min-max quantities are set on the Manage Inventory page in the Supplier Portal work area or using the Vendor-Managed Inventory Items REST service.

2. The supplier monitors the replenishment status of items and decides which items need replenishment. If the on-hand quantity is less than the minimum quantity, the supplier creates a replenishment request.

3. The supplier submits replenishment request, which is then transformed into an externally managed purchase requisition by Supply Chain Collaboration using the Purchase Request web service.

4. Based on a blanket purchase agreement, a purchase order is generated from the requisition either automatically or manually by the buyer. The purchase order is then approved and ready for the supplier to fulfill. For more information on purchase agreements and purchase orders, see the Oracle Procurement Cloud Using Procurement guide.

5. The supplier inventory manager is now able to fulfill the purchase order. They can view the open purchase order quantity in the Purchase Order Quantity column on the Manage Inventory page. They can also navigate to the open purchase orders using the Manage Orders page.

6. The supplier inventory manager is now able to ship the product. The supplier optionally creates an advanced shipment notice (ASN) using **Create ASN** on the Manage Inventory page. Once an ASN is created the quantity shipped now appears as In-Transit Quantity on the Manage Inventory page.

7. The inventory management user receives and delivers the item to its deliver-to location. The supplier inventory manager can view the items awaiting to be delivered using the Received Quantity column on the Manage Inventory page. Once an item has been delivered it will be included in the on-hand quantity.

8. The supplier inventory manager may create an invoice, or an invoice will be automatically generated by the enterprise on behalf of the supplier. The supplier inventory manager can view the invoices associated to a specific replenishment item by using **Review Item Transactions** on the Manage Inventory page.

9. The enterprise processes the invoice and generates a payment. The supplier inventory manager can view the payments associated with a specific replenishment item using **Review Item Transactions** on the Manage Inventory page.

VMI When Enterprise Owns Inventory Planning and Replenishment

This figure provides an overview of VMI when the enterprise owns inventory planning and replenishment:

The following table describes the product work areas, VMI processes, and the corresponding actions.

Work Areas	VMI Process	Actions
Item Record	Enterprise maintains minimum and maximum thresholds on the item or item subinventory	Share minimum and maximum thresholds with suppliers and VMI analysts

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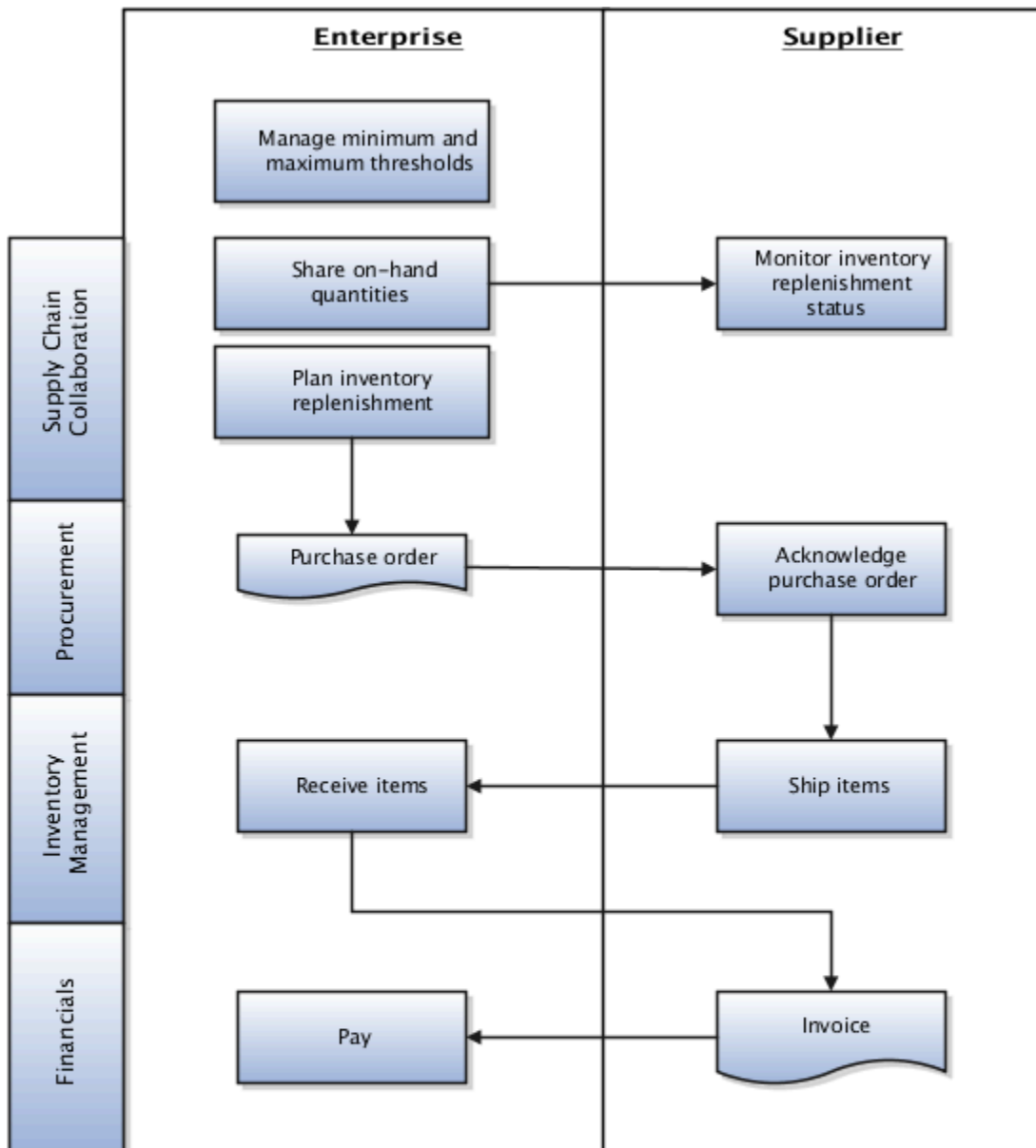| Work Areas	VMI Process	Actions
Item Subinventory Record	record. Min-max quantities can be manually updated or calculated using the Calculate Min-Max Planning Policy Parameters scheduled process. To learn more see the Using Inventory Management guide.	
Inventory Management	Enterprise maintains on-hand quantities in Inventory Management	Share on-hand quantities with suppliers and VMI analysts
Supplier Portal	Calculate replenishment status using on-hand quantities and minimum and maximum thresholds.	Suppliers monitor replenishment status
Inventory Management	Enterprise performs inventory replenishment.	Enterprise runs min-max planning report or manually creates purchase orders. For more information, see the Using Inventory Management guide
Supplier Portal	Purchase order awaits shipment	Supplier creates an advanced shipment notice (ASN) Supplier ships a product
Inventory Management	Enterprise receives shipment and delivers items.	Create a receipt notice
Supplier Portal	Supplier creates invoice or enterprise can generate the invoice on behalf of the supplier.	Supplier creates an invoice
Financials	Enterprise pays supplier	Enterprise creates a payment notice

Enterprise Inventory Planning Owner Flow

The VMI process flow when the enterprise owns inventory planning and replenishment includes the following steps:

1. The enterprise user sets the minimum and maximum quantities. If the VMI relationship scope is organization, min-max quantities are set on the item record. If the VMI relationship scope is subinventory, min-max quantities are set on the item subinventory.
2. The enterprise user can also automatically calculate min-max quantities using the Calculate Min-Max Planning Policy Parameters scheduled process. The enterprise user monitors the replenishment status of the item and decides which item needs replenishment. To replenish items, the enterprise user creates purchase orders manually or generates purchase orders automatically by running the min-max planning report. For more information about min-max planning report, see the Using Inventory Management guide
3. Optionally, the generated purchase order can require supplier acknowledgment. The supplier is allowed to make changes to the suggested replenishment at that time. The supplier can view the requiring acknowledgment quantity in the Pending Acknowledgment column on the Manage Inventory page. They can also navigate to the purchase orders using the Manage Orders page.
4. Once acknowledged, the supplier inventory manager is now able to fulfill the purchase order. They can view the open purchase order quantity listed in the Purchase Order Quantity column on the Manage Inventory page. They can also navigate to the open purchase orders using the Manage Orders page.

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5. The supplier inventory manager is now able to ship the product. The supplier can optionally create an advanced shipment notice (ASN) using **Create ASN** on the Manage Inventory page. Once the ASN is created, the quantity shipped now appears as In-Transit Quantity on the Manage Inventory page.

6. The inventory management user receives and delivers the item to its deliver-to location. The supplier inventory manager can view the items awaiting to be delivered using the Received Quantity column on the Manage Inventory page. Once an item is delivered it will be included in the on-hand quantity.

7. The supplier inventory manager may create an invoice, or an invoice will be automatically generated by the enterprise on behalf of the supplier. The supplier inventory manager can view the invoices associated to a specific replenishment item using **Review Item Transactions** on the Manage Inventory page.

8. The enterprise processes the invoice and generates a payment. The supplier inventory manager can view the payments associated to a specific replenishment item using **Review Item Transactions** on the Manage Inventory page.

Vendor-Managed Inventory User Roles

The following table describes the vendor-managed inventory (VMI) user roles:

User Role	Description
Vendor-Managed Inventory Analyst	An enterprise user who can perform the following tasks using Oracle Supply Chain Collaboration work area and REST services: • Monitor replenishment status using the Manage Inventory page and infolets • View on-hand quantities for replenishment items • View min-max inventory thresholds • Review replenishment item transactions • Monitor replenishment requests using the Manage Replenishment Requests page and the Replenishment Requests infolet • Monitor the replenishment life cycle by viewing replenishment item transactions and the Replenishment Life Cycle infolet
Supply Chain Application Administrator	An enterprise user who can perform the following tasks: • Manage VMI network relationships • Manage VMI analysts • Manage network and enterprise user data security using REST services
Supplier Inventory Manager	A supplier user who can perform the following tasks using Oracle Supplier Portal work area and REST services: • Monitor replenishment status using the Manage Inventory page • View on-hand quantities for replenishment items • View and provide minimum and maximum inventory thresholds • Create replenishment requests • Monitor the replenishment life cycle by viewing replenishment item transactions

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B2B Messaging

Overview of B2B Messages

Business to Business (B2B) messages exchange information among trading partners about key transactions in the supply collaboration and order-to-cash. Oracle Supply Chain Collaboration uses Oracle Collaboration Messaging Framework to better manage B2B communications with large numbers of suppliers.

For a supplier to exchange B2B messages, you must first enable the business processes in Collaboration Messaging and then using these steps you can configure the B2B messaging set up for a supplier site:

1. In the Supply Chain Collaboration work area, select **Manage Supply Collaboration Network** from the task menu.
2. Search for and select a supplier site.
3. From the **Actions** menu click **Edit Collaboration Configuration**.

   The Edit Supplier Collaboration Configuration page is displayed, with the supplier information displayed at the top of the page and the Trading Partner Assignment and Document Setup tabs. You use the Trading Partner Assignment tab to set up the trading partners that your supplier will exchange B2B messages with and the Document Setup tab to define the documents exchanged with each trading partner.

For more information about setting supplier up for B2B messaging, see *Oracle Fusion Configuring and Managing B2B Messaging* guide.

Using the Supply Chain Collaboration work area, the collaboration planner can:

- View a count of the failed and undelivered messages.

- View details of the failed and undelivered messages.

- Contact the B2B administrator to investigate the failed and undelivered messages and reprocess them.

2 Configure Supply Collaboration

Types of Supply Collaboration

The following types of supply collaborations are supported:

- Managed collaboration: Where the collaboration plan and collaboration relationship are defined in Oracle Supply Chain Collaboration.

- B2B Only collaboration: Where the collaboration plan and collaboration relationship aren't defined in Supply Chain Collaboration and Supply Chain Collaboration is a pass through to Oracle Collaboration Messaging Framework. For B2B Only collaboration, the supplier site must be enabled for Collaboration Messaging Framework forecast or commit collaboration. B2B Only collaboration data won't be included in the following:

  - Oracle Supplier Portal

  - Supply Chain Collaboration exception evaluation

  - Supply Chain Collaboration historical tables

For more information on using collaboration messaging, see the Oracle Procurement Cloud Implementing Procurement guide.

Manage Supply Collaboration Network

How You Manage Supply Collaboration Network

You create a collaboration relationship between trading partners to supply an item. The Manage Supply Collaboration Network page displays the list of collaboration relationships between trading partners. You can use the search section to view the relevant collaboration relationships. For example, you can view all the relationships defined as a combination of a ship-from supplier site, ship-to organization, and an item.

> **Note:** You need the Supply Chain Application Administrator role to configure Oracle Supply Chain Collaboration.

You can access the Manage Supply Collaboration Network page from the Supply Chain Collaboration work area by clicking the Manage Supply Collaboration Network task in the Tasks panel. In the Manage Supply Collaboration Network page, you can perform the following actions:

- Search for relationships

- Create new relationships

- Modify relationships

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Search for Collaboration Relationships

On the Manage Supply Collaboration Network page, you can search for and view the collaboration relationship by entering the search parameters.

Create a Collaboration Relationship

On the Manage Supply Collaboration Network page, you can create a collaboration relationship between trading partners.

> **Note:** On the Manage Supply Collaboration Network page, you can't create collaboration relationships sourced from an external source system.

To create a collaboration relationship:

1. In the Supply Chain Collaboration work area, click **Manage Supply Collaboration Network** in the Tasks panel.
2. On the Manage Supply Collaboration Network page, click **Actions** > **Create**.
3. On the Create Relationship dialog box, select the values for **Ship-from Supplier Site** and **Ship-to Organization**.

   The fields relevant to the ship-from supplier and ship-to organization are populated.

   To define a drop ship relationship, select a ship-to organization where the ship-from supplier site and ship-to supplier site are the same.
4. Select the item the trading partners can supply from the site.

   You can see only the items associated with the selected organization listed. The item must be associated to the ship-to organization in the Product Information Management work area before it can be selected in the Supply Chain Collaboration work area.
5. Enter the effective start date and effective end date. The effective dates determine when a relationship is active.

   If you don't enter a start date, the relationship is treated as active from the current date until the end date. If you don't enter an end date, the relationship is treated as active from the start date.

   You can create only one relationship for a combination of a ship-from supplier site, ship-to organization, and an item with the same effective date range.
6. Click **Save and Continue** to save the new relationship.

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7. On the Edit Relationship page, enter values for these fields:

   ◦ Forecast Horizon in Days: The duration Supply Chain Collaboration must provide forecast data to the supplier.
   ◦ Commit Horizon in Days: The duration a supplier must provide commit data to Supply Chain Collaboration.
   ◦ Commit SLA in Days: The number of days a supplier has to provide commits against a forecast. If the supplier doesn't provide commit an exception is thrown.

   Decomposition calculates all collaboration parameters configured with the Supply Chain Collaboration managed relationships. For example, if the Commit SLA is 2 days and the forecast is received on 5 Jan, 2017, the Commit Due Date will be 7 Jan, 2017. In addition to the schedule details, the latest commit due date is also stored. This is the due date used when calculating commit due dates.

8. Click **Save and Close** to save the new relationship.

Modify a Collaboration Relationship

On the Manage Supply Collaboration Network page, you can modify a collaboration relationship between trading partners.

To modify a collaboration relationship:

1. In the Supply Chain Collaboration work area, click **Manage Supply Collaboration Network** in the Tasks panel.
2. On the Manage Supply Collaboration Network page, search for the collaboration relationship.
3. Select a row in the search results and click **Actions** > **Edit**.
4. On the Edit Relationship page, modify the following parameters:

   ◦ Effective Start Date

   ◦ Effective End Date

   ◦ Forecast Horizon in Days

   ◦ Commit Horizon in Days

     > **Note:** If you don't specify a forecast horizon or a commit horizon, the defaults specified in Manage Supply Chain Collaboration Settings task in Setup and Maintenance during implementation will be used.

   ◦ Commit SLA in Days

5. Click **Save and Close**.

   > **Note:** For an existing collaboration relationship, changes to the relationship attributes won't be effective until the next planning cycle.

Duplicate a Collaboration Relationship

On the Manage Supply Collaboration Network page, you can duplicate an existing collaboration relationship to create a new relationship. This can save time when you need to create multiple relationships among a set of trading partners that differ only by item or by site.

> **Note:** You can't duplicate collaboration relationships sourced from an external source system.

To duplicate a collaboration relationship:

1. In the Supply Chain Collaboration work area, click **Manage Supply Collaboration Network** in the Tasks panel.
2. On the Manage Supply Collaboration Network page, search for the collaboration relationship.
3. Select a row in the search results and click **Actions** > **Duplicate**.
4. On the Create Relationship dialog box, the **Ship-from Supplier Site**, **Ship-to Organization**, and **Item** fields are populated from the existing relationship.
5. Select new values for **Ship-from Supplier Site** and **Ship-to Organization**.

   The items relevant to the ship-from supplier and ship-to organization are populated.

   > **Note:** The relationship between the ship-from supplier, ship-to organization, and item is unique. You can't have more than one relationship with the same combination.

6. Select the item the trading partners can supply.
7. Enter the effective start date and effective end date.

   The effective dates determine when a relationship is active.

   > **Note:** If you don't enter a start date, the relationship is treated as active from the current date until the end date. If you don't enter an end date, the relationship is treated as active from the start date.

8. Do one of the following:

   - Click **Save and Create Another** to save the new relationship, display the relationship in the search results, and to be ready to create another relationship using the same values.
   - Click **Save and Close** to save the new relationship and close the Create Relationship dialog box.
   - Click **Save and Continue** to save the new relationship and edit the relationship.

9. On the Edit Relationship page, enter the following values:

   - Forecast Horizon in Days
   - Commit Horizon in Days
   - Commit SLA in Days

10. Click **Save and Close** to save the new relationship.

    Requery to display the relationship in the search results.

Delete a Collaboration Relationship

On the Manage Supply Collaboration Network page, you can delete a collaboration relationship.

To delete a collaboration relationship:

1. In the Supply Chain Collaboration work area, click **Manage Supply Collaboration Network** in the Tasks panel.
2. On the Manage Supply Collaboration Network page, search for the collaboration relationship.
3. Select a row in the search results and click **Actions** > **Delete**.

A warning appears to confirm the deletion of the relationship.

4. Click **Yes**.

The relationship is deleted.

Update Multiple Collaboration Relationships

On the Manage Supply Collaboration Network page, you can update multiple collaboration relationships.

To update multiple collaboration relationships:

1. In the Supply Chain Collaboration work area, click **Manage Supply Collaboration Network** in the Tasks panel.
2. On the Manage Supply Collaboration Network page, select **Collaboration relationships**.
3. Search for the collaboration relationships.
4. Select multiple rows in the search results and click **Actions** > **Edit**.

   Note: When you select multiple rows in the search results, you can no longer duplicate the collaboration relationships.

5. On the Edit Relationships page, modify the required parameters.

   Note: Any changes in the values will modify the parameter values for all the selected collaboration relationships.

   When editing relationships whose source systems are different, you can't set the **UOM Definition Source** to **Other**.

6. Click **Save and Close**.

   Note: For an existing collaboration relationship, changes to the relationship attributes won't be effective until the next planning cycle.

Create Collaboration Relationships from Relationship Candidates

Collaboration relationship candidates provide visibility into the unprocessed or B2B-only transactions for active collaboration plans that aren't being managed by Supply Chain Collaboration because of missing setup data. You can select relationship candidates that aren't collaborated on and convert them to collaboration relationships on the Manage Supply Collaboration Network page.

Note: You can select relationship candidates that are sourced from an external source system and convert them to collaboration relationships.

1. In the Supply Chain Collaboration work area, click **Manage Supply Collaboration Network** in the Tasks panel.
2. On the Manage Supply Collaboration Network page, select **Relationship candidates**.
3. Search for the relationship candidates that aren't collaborated on and:
   - To convert only a few relationship candidates, select the rows in the search results and click **Actions** > **Convert to Relationships**.

- - To convert all the relationship candidates in the search results, click **Actions** > **Convert All Search Results**.

  You can now edit the relationships individually or all at once.

When you create the collaboration relationship from a collaboration relationship candidate, the unprocessed order forecasts still within the interface tables will be published using the Prepare Candidate Order Forecasts for Decomposition scheduled process. This scheduled process is automatically initiated after the candidates are converted.

> **Note:**

You must set the collaboration attributes calculated during the first publish of a collaboration cycle such as UOM Definition Source, Commit SLA, and Forecast and Commit Horizons at the time of editing relationships so that they're considered when republishing.

Related Topics
- Modify a Collaboration Relationship

How You Model a Multi-Tiered Relationship Between a Contract Manufacturer and a Supplier

In contract manufacturing relationships, you need to collaborate both with the contract manufacturer as well as the upstream component suppliers that provide critical components. Supply Chain Collaboration can send order forecasts to both the contract manufacturer as well as their suppliers as long as you model them in a collaboration relationship. This way, both the original equipment manufacturers and the contract manufacturer can get visibility to the component supply commitments.

This figure illustrates a multi-tiered relationship between a contract manufacturer and a supplier.
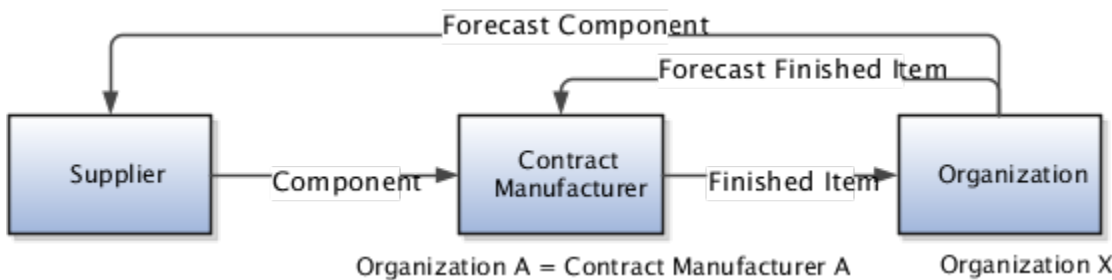
The following table lists an example of a multi-tiered relationship between a contract manufacturer and a supplier.

Relationship	Ship From	Ship to	Item
1	Supplier B	Contract Manufacturer A (Organization A)	Component
2	Contract Manufacturer A	Organization X	Finished Item

In the example, Supplier B is shipping components to Contract Manufacturer A. Contract Manufacturer A is shipping the finished items to the enterprise Organization X.

The ship to attribute of a collaboration relationship is always mapped to an inventory organization or item organization. For Contract Manufacturer A to be a valid ship-to organization, you must model Contract Manufacturer A as an inventory organization.

To model a multi-tiered relationship between contract manufacturer and a supplier:

1. Setup contract manufacturers (Ship-to Supplier Sites) as organizations associated to a supplier site in Oracle Supply Chain Planning Supply Network Model.
2. Define a relationship in Supply Chain Collaboration by defining the ship-to as the contract manufacturer organization.
3. Enable the contract manufacturer to view forecasts, edit forecast quantities and commit on behalf of their upstream suppliers within the Trading Partner Access section of the collaboration relationship.

For more information on using collaboration messaging, see the Oracle Procurement Cloud Implementing Procurement guide.

Related Topics

- How You Manage Collaboration Planners
- Enable Contract Manufacturers to Manage Order Forecasts on Behalf of Upstream Suppliers

Enable Contract Manufacturers to Manage Order Forecasts on Behalf of Upstream Suppliers

Contract manufacturers are organizations associated to a supplier site. You can enable a contract manufacturer to view order forecasts, edit forecast quantities, and commit on behalf of their upstream suppliers.

To modify a collaboration relationship:

1. From the Supply Chain Collaboration work area, click **Manage Supply Collaboration Network** in the Tasks panel.
2. On the Manage Supply Collaboration Network page, search for the collaboration relationship.
3. Select a row in the search results and click **Actions** > **Edit**.
4. On the Edit Relationship page, the Trading Partner Access section, set **View Order Forecasts** to one of the following values:

   ○ **Yes** to enable supplier site contacts to view forecasts for items shipped to their site.

   ○ **No** to disable supplier site contacts from viewing forecasts.

   Note: The Trading Partner Access section is enabled only when the ship-to organization is associated with a supplier site in the Supply Chain Planning Supply Network model.

5. If **View Order Forecasts** is set to **Yes**, you can set the following values:

   ○ **Adjust Order Forecasts** to enable or disable supplier site contacts from entering and submitting forecast quantity changes and republishing the order forecast.

   ○ **Adjust Commits** to enable or disable supplier site contacts from entering and submitting commit quantities to the enterprise.

6. Click **Save and Close**.

Search For Contract Manufacturers

In the Manage Supply Collaboration Network page, you can search for and view the contract manufacturers by using the Ship-to Supplier and Ship-to Supplier Site parameters. Using these parameters you can search for a specific supplier or site, or use Is not blank to return all contract manufacturers.

Edit a Collaboration Configuration

For a supplier to receive Business to Business (B2B) messages you must enable the supplier for B2B collaboration. On the Manage Supply Collaboration Network page, you can enable a supplier site for B2B messaging or edit their current configuration.

> **Note:** B2B collaboration is enabled by supplier site. When a site is enabled for B2B messaging, it applies to all the relationships that contain the ship-from supplier site.

To edit a collaboration configuration:

1. In the Supply Chain Collaboration work area, click **Manage Supply Collaboration Network** in the Tasks panel.
2. On the Manage Supply Collaboration Network page, search for the collaboration relationship.
3. Select a row in the search results and click **Actions** > **Edit Collaboration Configuration**.
4. On the Edit Supplier Collaboration Configuration page, the Associated Service Providers section, click **Actions** > **Add Row**.

   A new service provider row is added.
5. Select the service provider. The relevant trading partner IDs are populated.
6. Select the trading partner ID.
7. In the Collaboration Documents for Service Provider section, click **Actions** > **Add Row**.
8. Select the following supply planning document types:

   - PROCESS_FORECAST_OUT for the outgoing forecast message the supplier receives.

   - ACKNOWLEDGE_FORECAST_IN for the commit response the supplier sends back to the enterprise.
9. Set the Association Status to one of the following values:

   - **Enable** to enable the supplier site to send or receive B2B messages.

   - **Disable** to disable the supplier site to send or receive B2B messages.
10. Click **Save and Close**.

Configure Automatic Commits to Order Forecasts

Suppliers are contractually obligated to commit to order forecasts within a specified time frame. If a supplier does not commit to order forecasts within the due date on their contractually obligated commitment, there may be delays in the other planning processes. You can have an agreement with your supplier to commit automatically to order forecasts.

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As an administrator, configure Supply Chain Collaboration to commit automatically to order forecasts. You can set the automatic commits to match the commits from the previous cycle, or to commit to a percentage of the current forecast.

Note: You need the Supply Chain Application Administrator role to configure automatic commits to order forecasts.

To configure automatic commits to order forecasts:

1. In the Supply Chain Collaboration work area, click **Manage Supply Collaboration Network** in the Tasks panel.
2. On the Manage Supply Collaboration Network page, search for the collaboration relationship.
3. Select a row in the search results and click **Actions** > **Edit**.
4. On the Edit Relationship page, enter the number of days a supplier has to provide commits to an order forecast in **Commit SLA in Days**.
5. Select **Auto Commit** in **SLA Action**.
6. Select one of the following values for **Commit Period**:

   - **Commit Horizon**: The forecast commits are processed on the supplier's contractually obligated commitment due date.
   - **Days**: The number of days to process forecast commits without exceeding the commit horizon.

7. Select one of the following values for **Commit Quantity**:

   - **Previous forecast commits**: The committed order forecast quantity matches the commits from the previous commit cycle.
   - **Percentage of current forecast**: The committed order forecast quantity is a percentage of the current forecast.

8. Click **Save and Close**.

Note: For an existing collaboration relationship, changes to the relationship attributes will not be effective until the next planning cycle.

Set Unit of Measure Definition Source

The unit of measure (UOM) used in planning applications may be different from the UOM used to purchase goods. You can set the UOM definition source on a collaboration relationship to be used for all collaboration quantities. When you set the UOM on the collaboration relationship, all quantities including order forecasts, commits, open purchase orders, in-transit shipments, shipments in receiving, and purchase requisitions are converted and displayed in the specified collaboration UOM.

You must be a Supply Chain Application Administrator do this task.

1. In the Supply Chain Collaboration work area, click **Manage Supply Collaboration Network** in the **Tasks** panel.
2. On the Manage Supply Collaboration Network page, search for the collaboration relationship.
3. Select a row in the search results and click **Actions** > **Edit**.
4. On the Edit Relationship page, select one of these values for **UOM Definition Source**:

   - **Published order forecast**: To convert and display collaboration quantities in the UOM of the order forecast published to Supply Chain Collaboration. This is the default value and accepts the UOM published by Oracle Fusion Cloud Supply Chain Planning. If a UOM isn't provided, Supply Chain Collaboration will use the item's primary UOM set on the item record.

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- ○ **Approved supplier list**: To convert and display collaboration quantities in the purchasing UOM defined on the approved supplier list matching the item and supplier.
  - ○ **Primary**: To display collaboration quantities in the item's primary UOM. The item's primary UOM is defined on the item record.
  - ○ **Other**: To convert and display collaboration quantities in the user-defined UOM set on the collaboration relationship.

5. If **UOM Definition Source** is set to **Other**, select a value for **UOM**.
6. Click **Save and Close**.

> **Note:** For an existing collaboration relationship, changes to the relationship attributes won't be effective until the next planning cycle.

For collaboration plans using items and organizations sourced from an external planning source system, **UOM Definition Source** depends on Supply Chain Planning to resolve the available UOMs, UOM conversions, item's primary UOM, and purchasing UOM.

For more information about defining units of measure, see the Implementing Common Features for SCM guide.

Manage Business Unit Resolution Rules

Use the business unit resolution rules to assign a unique procurement business unit to order forecasts when publishing externally sourced collaboration plans.

Why You Use Business Unit Resolution Rules

A supplier site can serve multiple procurement business units, which can lead to incorrectly assigning a procurement business unit to order forecasts and supplier commits. If your supplier site names aren't unique across procurement business units and you're not specifying the procurement business unit when you publish your order forecast data, you will need to implement these rules to derive accurate order forecasts and supply commits.

How Business Unit Resolution Rules Work

When you publish a supply plan and you don't specify procurement business units, the business unit resolution rules are applied and the procurement business units specified in each rule are used.

Define a Business Unit Resolution Rule

1. From the Supply Chain Collaboration work area, open the Manage Supply Collaboration Network task.
2. From the page-level view options, select **Business unit resolution rules**.
3. Click the Add icon.
4. In the Create Business Unit Resolution Rules dialog box, configure your rule.

   a. Select an organization.
   b. Select a supplier.
   c. Select a supplier site.
   d. Select a procurement business unit.
   e. Save your changes.

Manage Collaboration Plans

Planning Cycle

When defining a collaboration plan, you define the frequency of planning cycles to collaborate with your trading partners, which depends on the types of products you collaborate on and their associated lead times. This frequency defines the planning cycle expectation for the collaboration plan.

You can manage planning cycles at a weekly or monthly frequency. In a weekly frequency, you can pick the duration and the start day (Monday to Sunday) on which the collaboration plan is published to your suppliers. In a monthly frequency, you can pick a duration and either choose the relative day of the month (example, first Monday, third Friday, or last Thursday) or a date in the month (example, 15 or 20) on which the collaboration plan is published to your suppliers.

The decomposition process determines the planning cycle for all incoming managed records. The decomposition process calculates the start and end dates for the collaboration plan depending on the planning cycle. These dates are used to determine if the plan data received is for a new planning cycle or an update to an existing planning cycle.

For example, the following table lists a collaboration plan US-Production with a weekly frequency and the start date set for Monday.

Date Received	Cycle Dates	Mid-Cycle Update
Monday, 16-Jan-2017	Start: 16-Jan End: 22-Jan	New, no source exists for US Production
Wednesday, 18-Jan-2017	Start: 16-Jan End: 22-Jan	Update, source exists from 16-Jan-2017
Tuesday, 24-Jan-2017	Start: 23-Jan End: 29-Jan	New, received date is outside of the currently saved planning cycle. The source start and end date and object version are updated

The start date is calculated based on the first time you receive the plan data as it relates to the collaboration frequency. If you publish a plan on Tuesday, January 17, the data is treated as a new planning cycle with a start date of January 16. This sets the cycle frequency and the plan is expected every week. If the plan isn't published on January 23, the previous plan data for January 16 expires automatically on January 22.

The planning cycle of a collaboration plan is continuous. Even if the plan isn't published for a long period of time, if a cycle is established, the plan is retained.

When you change the frequency or the start date for a collaboration plan, the change doesn't take effect until the next planning cycle. If you want to reset the planning cycle, you need to create a new collaboration plan.

You can search for a collaboration plan based on the planning cycle start and end dates using the manage forecast search page.

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> **Note:** The B2B Only relationships without a defined collaboration plan don't have a defined planning cycle. All the data sent is treated as a new cycle. The B2B Only collaboration will expire in 15 days. If a collaboration plan is defined, the B2B Only data uses the defined planning cycle rather than the fixed value of 15 days.

How You Manage Collaboration Plans

You create a collaboration plan in Oracle Supply Chain Collaboration to enable a supply plan created in Oracle Planning Central or Oracle Fusion Cloud Supply Chain Planning for collaboration. As an enterprise user, you can search for the supply plan using the supply plan or the collaboration plan on the Manage Collaboration Plans page. As a supplier, you can search for the supply plan only by the collaboration plan in Oracle Fusion Supplier Portal.

> **Note:** You need the Supply Chain Application Administrator role to configure Supply Chain Collaboration.

On the Manage Collaboration Plans page, you can perform the following actions:

- Search for collaboration plans
- Create new collaboration plans
- Modify collaboration plans

Search for Collaboration Plans

On the Manage Collaboration Plans page, you can view the collaboration plans by searching for the plan by entering the search parameters.

Create a Collaboration Plan

On the Manage Collaboration Plans page, you can create a new collaboration plan.

When a supply plan is published from Oracle Planning Central or Oracle Supply Planning for a collaboration plan, Oracle Supply Chain Collaboration sets the **Source System** attribute. If the supply plan has organizations and items collected from an external source system, then the collaboration plan **Source System** attribute is set to **External**. If the supply plan has organizations and items collected from Oracle Fusion applications, then the collaboration plan **Source System** attribute is set to **Oracle**. Once the collaboration plan's source system is set it can't be changed. Create a new collaboration plan if the source system changes in Supply Planning.

> **Note:** A supply plan that's partly defined in an Oracle application and partly in an external application isn't supported.

To create a collaboration plan:

1. In the Supply Chain Collaboration work area, click **Manage Collaboration Plans** in the Tasks panel.
2. On the Manage Collaboration Plans page, click **Actions** >**Create**.
3. On the Create Collaboration Plan dialog box, select the source of the supply plan. The supply plans are created using Oracle Supply Chain Planning or an external application.

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4. Select the supply plan. The default collaboration plan name is same as the supply plan. If required, enter a new name for the collaboration plan.

> **Note:** Only the collaboration plan name is available to the suppliers using Oracle Supplier Portal.

5. Select the initial status of the collaboration plan.
6. Select the frequency.

   ○ When you select a weekly frequency, you can define the **Duration** value and **Start Day** with a value of Monday to Sunday.
   ○ When you select a monthly frequency, you can either define the **Duration** value and **Start Date** with a value of 1 to 28 or a **Start Day** with a start day ordinal of First, Second, Third, Fourth, or Last and start day with a value of the name of the day (Monday to Sunday).

7. Click **Save and Close** to save the new collaboration plan.

Modify a Collaboration Plan

On the Manage Collaboration Plans page, you can modify a collaboration plan.

To modify a collaboration plan:

1. In the Supply Chain Collaboration work area, click **Manage Collaboration Plans** in the Tasks panel.
2. On the Manage Collaboration Plans page, search for the collaboration plan.
3. Select a row in the search results and click **Actions** > **Edit**.
4. On the Edit Collaboration Plan page, modify the required parameters.
5. Click **Save and Close**.

Create Collaboration Plans from Plan Candidates

On the Manage Collaboration Plans page, you view the published supply plans that aren't being collaborated on and use them to create collaboration plans.

To create collaboration plans from plan candidates:

1. In the Supply Chain Collaboration work area, click **Manage Collaboration Plans** in the Tasks panel.
2. On the Manage Collaboration Plans page, select **Plan candidates**.
3. Search for the published supply plans that aren't being collaborated on.
4. Select the supply plan and click **Actions** > **Convert to Collaboration Plan**.

   You can now edit the plan.

Related Topics
- Modify a Collaboration Plan

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FAQs for Collaboration Plans

How can I determine how many relationships are associated with a collaboration plan?

Search for collaboration plans on the Manage Collaboration Plans page. The Relationship Candidates column displays the number of relationship candidates associated with the plan. The Collaboration Relationships column displays the number of relationships associated with the plan.

Related Topics
- Create a Collaboration Plan

How you determine how many relationships are associated with a published supply plan for which a collaboration plan is not created?

Search for plan candidates on the Manage Collaboration Plans page. The Relationship Candidates column displays the number of relationship candidates associated with the supply plan. The Collaboration Relationships column displays the number of relationships associated with the supply plan.

Manage Aggregation Schedules

Overview of Aggregation Schedules

Aggregation is the process of collecting data and consolidating multiple values into a single value. For example, order forecast quantities are sent and stored in daily time buckets. However, the daily values can be summed and displayed in weekly, monthly, or period aggregation based on an active schedule and the displayed aggregation level.

An active schedule is defined in the Setup and Maintenance > Manage Facility Schedules task. For a time bucket generation, the quarterly type, effective from date, and effective to date are used. The period for all days is inclusive of the effective from date and the effective to date.

The displayed aggregation level determines how the data is displayed on the Manage Order Forecasts and Commits page. You can schedule aggregation by week or use a period definition. By default, forecasts are displayed aggregated by week.

The displayed aggregation level is used to calculate exceptions; for example, if displayed aggregation is set to week and day, all exceptions are calculated using weekly quantities. Exceptions are not recalculated when the displayed aggregation level is changed mid-planning cycle; for example, if you change the displayed aggregation level from week and day to period and day in the middle of a planning cycle, the exceptions that were already calculated are displayed at weekly level, even though the aggregation is displayed in months. Due to this, you may observe incorrect results.

The aggregation schedule is used to determine:

- How forecasts are aggregated when displaying to collaboration planners and suppliers.

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- How exceptions are calculated.

Note: You need the Supply Chain Application Administrator role to configure Oracle Supply Chain Collaboration.

Default Active Schedule

In addition to the user defined active schedule, there is a system schedule called Supply Chain Collaboration Default. Supply Chain Collaboration Default is monthly quarterly type with the effective from date and effective to date set to NULL. These values indicate that the default schedule is always active and never ends.

The time buckets are generated using the Supply Chain Collaboration Default schedule when:

- An active schedule is not selected.

- An active schedule is selected, but is no longer active because the effective from date and effective to date range has expired.

Define an Aggregation Schedule

To define an aggregation schedule:

1. In the Supply Chain Collaboration work area, click **Define Aggregation Schedule** in the Tasks panel.
2. On the Define Aggregation Schedule page, select an active schedule. Alternatively, you can search for the active schedule based on the schedule name, quarterly type, the effective from date, or the effective to date.
3. Select one of the following displayed aggregation level:

   o Week and day: The forecasts are aggregated at a weekly level.

   o Period and day: The forecasts are aggregated based on the quarterly type selected for the active schedule.
4. Click **Save and Close**.

If you are modifying the aggregation schedule, the changes will not take effect until the next planning cycle. Until the end of the current active planning cycle, there may be a mismatch in the counts displayed for the exceptions and order forecasts. For example, if you are changing the aggregation schedule from monthly to weekly, there may be a mismatch in the exception counts until the current monthly planning cycle ends.

Manage Collaboration Planners

How You Manage Collaboration Planners

As a Supply Chain Collaboration user you work with external suppliers and require profiles with security settings that aren't generally available in other Oracle Fusion applications. You can create and manage a Supply Chain Collaboration Planner and associate the collaboration planner with appropriate access to suppliers and supplier sites.

Supply Chain Collaboration supports two modes of data security:

- An inclusive data access, where all order forecasts are treated as confidential and you need to explicitly associate a collaboration planner to access specific supplier sites.

- An exclusive data access, where all order forecasts are treated as public until you explicitly associate a collaboration planner to supplier sites.

By configuring collaboration planner access, you can display only the:

- Data from suppliers or supplier sites accessible to the collaboration planner on the Supply Chain Collaboration work area.

- Order forecasts from the supplier sites that are associated with the collaboration planner on the Manage Order Forecasts and Commits page.

Note: You need the Supply Chain Application Administrator role to access the Manage Collaboration Planners page.

You can access the Manage Collaboration Planners page from the Supply Chain Collaboration work area by clicking the **Manage Collaboration Planners** task in the Tasks panel.

In the Manage Collaboration Planners page, you can perform the following actions:

- Search for collaboration planners
- Create new collaboration planners
- Modify collaboration planners

You can view this page only when data access is enabled. For more information on data access, see the Implementing Manufacturing and Supply Chain Materials Management guide.

Search for Collaboration Planners

On the Manage Collaboration Planners page, you can search for and view the collaboration planners by entering the search parameters. For example, you can view all the collaboration planners who are assigned to a supplier or a supplier site.

Create a Collaboration Planner

On the Manage Collaboration Planners page, you can create a collaboration planner from an existing Oracle Fusion user.

To create a collaboration planner:

1. In the Supply Chain Collaboration work area, click **Manage Collaboration Planners** in the Tasks panel.
2. On the Manage Collaboration Planner page, click **Actions** > **Create**.
3. On the Create Collaboration Planner dialog box, select the collaboration planner.
4. Select one of the following values for **Full Access**:
   - **Yes** to allow access to all suppliers and supplier sites.
   - **No** to select access to specific suppliers and supplier sites.
5. On the Data Access Security section, select one of the following values for **Status**:

      ○ **Active** to enable the collaboration planner.

      ○ **Inactive** to disable the collaboration planner.

6. Click the **Add** icon to add a new row in the Data Access Security table.
7. Select one of the following values for **Security Context**:

      ○ **Supplier** to set **Security Context Value** to suppliers.

      ○ **Supplier Site** to set **Security Context Value** to supplier sites.

8. Select the value for **Security Context Value**.
   The values for **Ship-from Supplier** and **Ship-from Supplier Site** are populated.
9. Click **Save** to save the new collaboration planner.
10. Click **Save and Close** to save the new collaboration planner and close the Create Collaboration Planner dialog box.

Modify a Collaboration Planner

On the Manage Collaboration Planners page, you can modify a collaboration planner.

To modify a collaboration planner:

1. In the Supply Chain Collaboration work area, click **Manage Collaboration Planners** in the Tasks panel.
2. On the Manage Collaboration Planner page, search for the collaboration planner.
3. Select a row in the search results and click **Actions** > **Edit**.
4. On the Edit Collaboration Planner page, modify the following parameters:

      ○ Full Access

      ○ Status

5. Click the **Add** icon to add a new row in the Data Access Security table.
6. Select one of the following values for **Security Context**:

      ○ **Supplier** to set **Security Context Value** to suppliers.

      ○ **Supplier Site** to set **Security Context Value** to supplier sites.

7. Select the value for **Security Context Value**.
   The values for **Ship-from Supplier** and **Ship-from Supplier Site** are populated.
8. To delete data access, select a row from the Data Access Security table and click the **Delete** icon.
9. Click **Save and Close**.

   Note: For an existing collaboration planner, changes to the attributes won't be effective until the next planning cycle.

Duplicate a Collaboration Planner

On the Manage Collaboration Planners page, you can duplicate an existing collaboration planner. This can save time when you need to create multiple planners that differ only by supplier or supplier site.

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To duplicate a collaboration planner:

1. In the Supply Chain Collaboration work area, click **Manage Collaboration Planners** in the Tasks panel.
2. On the Manage Collaboration Planner page, search for the collaboration planner.
3. Select a row in the search results and click **Actions** > **Duplicate**.
4. On the Create Collaboration Planner dialog box, the **Full Access** and **Status** fields are populated from the existing collaboration planner that you're duplicating.
5. Select the collaboration planner.
6. Select values for **Full Access** and **Status**.

   The relevant values are populated.
7. Click the **Add** icon to add a new row in the Data Access Security table.
8. Select one of the following values for **Security Context**:

   ○ **Supplier** to set **Security Context Value** to suppliers.

   ○ **Supplier Site** to set **Security Context Value** to supplier sites.
9. Select the value for **Security Context Value**.

   The values for **Ship-from Supplier** and **Ship-from Supplier Site** are populated.
10. Do one of the following:

    ○ Click **Save** to save the new collaboration planner.

    ○ Click **Save and Close** to save the new collaboration planner and close the Create Collaboration Planner dialog box.

Delete a Collaboration Planner

On the Manage Collaboration Planners page, you can delete a collaboration planner.

To delete a collaboration planner:

1. In the Supply Chain Collaboration work area, click **Manage Collaboration Planners** in the Tasks panel.
2. On the Manage Collaboration Planner page, search for the collaboration planner.
3. Select a row in the search results and click **Actions** > **Delete**.
4. On the warning dialog box to confirm the deletion of the collaboration planner, click **Yes**.

   The collaboration planner is deleted.

Manage Scheduled Processes

Supply Collaboration Scheduled Processes

You create supply plans in Oracle Supply Chain Planning or Oracle Planning Central Cloud Service. In Oracle Supply Chain Collaboration, you use scheduled processes to:

- Filter the supply plan data and push it to the Supply Chain Collaboration interface tables.
- Decompose the plan data to make it available to suppliers and collaboration planners.

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- Pull the supplier commits back into planning applications as supplier capacity.

- Purge commit data from the collaboration interface tables.

- Purge historical data when it's no longer needed.

- Export collaboration order forecasts or commit data to CSV files.

- Verify existing collaboration relationships and enable the drop ship attribute.

- Load supply data for externally managed organizations to Supply Planning.

Publish Order Forecast

The Publish Order Forecast enterprise scheduled process is used to publish order forecast data. The Publish Order Forecast scheduled process supports both managed and B2B Only collaborations.

Every time a data is published from Oracle Fusion Cloud Supply Chain Planning to Oracle Supply Chain Collaboration, the Publish Order Forecast schedule process is run automatically. This sends the update of the published data to all the B2B enabled suppliers and contract manufacturers. If the **Schedule B2B publish process from the Publish B2B Outbound Messages for Order Forecasts scheduled process** option is set to Yes in the Manage Supply Chain Collaboration Settings page, the Publish Order Forecast process has to be run manually.

The Publish Order Forecast scheduled process filters the supply plan data by:

- Supply plan, which is the selected plan. If the scheduled process is called from a plan context, the plan name is defaulted to the current plan and isn't editable.

- Organization for supply planning

- Planner, which is the Supply Demand Planner ID

- Category

- Item, which is the enterprise item ID

- Supplier

- Supplier site, which are the sites for the selected supplier

The Publish Order Forecast scheduled process stores the supply plan data in the Supply Chain Collaboration interface tables.

When publishing order forecasts, if you include purchase orders, requisitions, or transfer orders, these quantities are combined with the planned order quantity to form the current forecast.

To configure the Publish Order Forecast scheduled process, select the following parameters:

- Include purchase orders in the order forecast: To include the planned order quantity and the purchase order quantities in your current order forecast quantity.

- Include requisitions in the order forecast: To include the planned order quantity and the requisition quantities in your current order forecast quantity.

- Run the Supply Collaboration Decomposition job: To run the Supply Collaboration Decomposition scheduled process immediately after the order forecast is published.

- Publish order details: To display the open purchase orders, purchase requisitions, in-transit shipments, and shipments in receiving as separate measures along with the current order forecast.

Note: If you don't select **Include purchase orders in the order forecast** or **Include requisitions in the order forecast**, the order forecast includes only the planned order quantities.

Schedule Decomposition

The Supply Collaboration Decomposition scheduled process is used to decompose the order forecast data.

The Supply Collaboration Decomposition scheduled process:

- Reads the published planning data from the interface tables
- Evaluates forecast exceptions
- Creates or updates an order forecast, used by Supply Chain Collaboration to publish to suppliers
- Assigns and launches the orchestration process

The Supply Collaboration Decomposition process makes the order forecast data available to suppliers and collaboration planners.

> **Note:** If the **Exclude unpublished order forecasts with zero quantities from the decomposition process** option is set to Yes in the Manage Supply Chain Collaboration Settings page, then relationship candidates and related order forecasts (if a previous forecast doesn't exist) aren't created for zero quantity order forecast during Decomposition process.

Receive Supplier Commits

The Receive Supplier Commits scheduled process is used to pull the supplier commits back into Oracle Supply Chain Planning or Oracle Planning Central as supplier capacity.

The forecast commits received in Oracle Supply Chain Collaboration are based on ship-from supplier site and ship-to organization. However, once the order commits are pulled into Supply Chain Planning or Planning Central Cloud as supplier capacity, the commits are aggregated by supplier site regardless of organization.

Purge Collaboration Interface Tables

The supplier commit data is stored in the collaboration interface tables until it's purged. After you publish the plan, receive supplier commits, and the collaboration cycle ends, purge all commit data from the collaboration interface tables by using the Purge Collaboration Interface Tables scheduled process. You can schedule this process to run whenever a new collaboration cycle begins, before the supply plan is published.

Purge Historical Data

The collaboration data, including all mid cycle forecast and commit updates, is permanently stored until it is purged. To purge the historical data, the Purge Supply Chain Collaboration Historical Data scheduled process is used. While setting up this process in Oracle Enterprise Scheduler, you can set the number of months of historical data that should be retained.

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Export Collaboration Order Forecasts

To export collaboration order forecasts or commit data to CSV files, use the Export Collaboration Order Forecasts scheduled process. While setting up this process in Oracle Enterprise Scheduler, you can set the supply plan to export and filter the export collection by specifying a supplier or item. In addition, you can select one or more of the following measures to include in your export data:

- Current Forecast: To export the current cycle collaboration forecast data.

- Current Commit: To export the current cycle collaboration forecast commit data.

- Previous Forecast: To export collaboration forecast data from the immediate previous collaboration cycle.

- Previous Commit: to export collaboration forecast commit data from the immediate previous collaboration cycle.

Enable Drop Ship for Existing Collaboration Relationships

A drop ship collaboration relationship requires the ship from supplier site to match the ship to supplier site associated with the organization. When you search for order forecasts, the drop ship collaboration order forecasts are aggregated at the ship to organization level. For example, if you have three order forecasts with the same ship from supplier, with an item each for 500 items going to a different ship to customer, you will have a single collaboration order forecast of 1500 items for the supplier to commit.

To enable drop ship for existing collaboration relationships where the ship to organization matches the ship from supplier site associated with the organization, you can use the Set Collaboration Relationship Drop Ship scheduled process.

Export Supplier On-Hand Quantities

You can use the Export Supplier On-Hand Quantities scheduled process to create and save a comma-separated values file with the supplier on-hand quantities. You can filter the quantities based on supplier, supplier site, item or number of days since publish date.

Purge Supplier On-Hand Quantities

Occasionally, you may need to purge supplier on-hand quantity records, because there may be changes such as suppliers no longer exist, items may be discontinued, or supplier on-hand records may become too old to be reliable.

You can use the Purge Supplier On-Hand Quantities scheduled process to purge the supply chain collaboration supplier on-hand quantity records based on user-defined parameters. You can choose to purge the records based on the number of days since publish date, which you can further filter by supplier, supplier site, or item.

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Manage Scheduled Processes

You use the Scheduled Processes work area to manage scheduled processes.

You can do the following:

- Manually run the scheduled process.
- Set up the processes to run at a reoccurring schedule.

Run the Scheduled Processes Manually

To manually run the scheduled process:

1. Go to the Scheduled Processes work area.
2. To publish the plan data to Supply Chain Collaboration, click **Actions** > **Schedule New Process**.
3. On Schedule New Process dialog box, search for the process; for example, Publish Order Forecast and click **OK**.
4. On the Process Details dialog box, select the plan you want to publish and click **Submit**. You can filter the plan further by selecting additional parameters.

   Ensure that the Publish Order Forecast process runs successfully. The selected plan data is now pushed into the Supply Chain Collaboration interface tables.
5. To decompose the plan data and make it available to suppliers and collaboration planners, click **Actions** > **Schedule New Process**.
6. On the Schedule New Process dialog box, search for the process; for example, Supply Collaboration Decomposition process and click **OK**.
7. On the Process Details dialog box, click **Submit**.

   Ensure that the Supply Collaboration Decomposition process runs successfully. The plan data is now available to suppliers and collaboration planners.

Set Up Processes to Run on a Reoccurring Schedule

To set up the processes to run on a reoccurring schedule:

1. Go to the Scheduled Processes work area, click **Actions** > **Schedule New Process**.
2. On the Schedule New Process dialog box, search for the process, for example, Supply Collaboration Decomposition and click **OK**.
3. On the Process Details dialog box, click **Advanced**.
4. In the Schedule tab, select **Using a schedule**.
5. Set the frequency to when you want the process to run.
6. Set an end date until when you want the process to run.
7. Click **Submit**.

The process is now set to run on a reoccurring schedule.

Load Supply Data for Externally Managed Organizations

You can synchronize the end item and component on-hand balances, purchase order details, work order demands, work order supplies, and work order resources with Oracle Supply Planning.

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Use the Load Supply Data for Externally Managed Organizations scheduled process to load the supply data for externally managed organizations from comma-separated values files to staging tables. The supply data is copied to the planning account and the load planning data process is initiated. It also sets the upload request status to processing.

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3 Configure Vendor-Managed Inventory

Manage VMI Network

How You Manage VMI Network

You create vendor-managed inventory (VMI) relationships between suppliers, organizations, and item combinations. Based on the relationships, the Manage Inventory page displays the items to be replenished by the supplier. The Manage VMI Network page displays the list of VMI relationships. You can use the search section to view the relevant VMI relationships. For example, you can view all the relationships defined for a specified organization or item.

Note: You must have the Supply Chain Application Administrator role to configure Oracle Supply Chain Collaboration.

You can access the Manage VMI Network page from the Supply Chain Collaboration work area. On the Manage VMI Network page, you can perform the following actions:

- Search for relationships
- Create new relationships
- Modify relationships
- Delete relationships

You can view this page only when vendor-managed inventory is enabled. For more information on enabling vendor-managed inventory, see the Implementing Manufacturing and Supply Chain Materials Management guide.

Inventory Planning Owner

The inventory planning owner is the user who owns inventory planning and replenishment creation activities. The inventory planning owner can be Enterprise or Supplier.

The inventory planning owner is derived using the inventory planning method defined on the item or the item subinventory record. If the inventory planning method is min-max planning, the inventory planning owner is Enterprise. If the inventory planning method is Supplier managed, the inventory planning owner is Supplier.

The scope of the vendor-managed inventory (VMI) relationship determines if the inventory planning owner is derived from the item or item subinventory record. If scope is Organization, the inventory planning method on the item is used. If scope is subinventory, the inventory planning method on the item subinventory record is used.

Note: If the inventory planning method is not planned or reorder point planning, the inventory planning owner is unresolved and not a valid candidate for VMI. Any changes to the inventory planning method on the item or item subinventory record will be automatically reflected on the VMI relationship. For example, if the inventory planning method changes from Supplier managed to Not Planned, the inventory planning owner will be Unresolved.

Related Topics
- Vendor-Managed Inventory Components

Create a VMI Relationship

On the Manage VMI Network page, you can create a vendor-managed inventory (VMI) relationship between suppliers, organizations, and item combinations.

To create a VMI relationship:

1. In the Supply Chain Collaboration work area, click **Manage VMI Network** in the Tasks panel.
2. On the Manage VMI Network page, click **Actions** > **Create**.
3. On the Create Relationship dialog box, select the values for **Organization**.
4. Select a value for **Supplier**.

   Note: The supplier must have at least one supplier site associated to the selected organization's requisitioning business unit to participate in a VMI relationship.

5. Select a value for **Scope**.
   - Select **Organization** if the supplier is managing the item across all storage subinventories within the selected organization
   - Select **Subinventory** if the supplier is managing the item at one or more specific storage subinventories within the selected organization
6. Select a value for **Item**:
   - If scope is **Organization**, only items associated with the selected organization that have an inventory planning method of min-max planning or supplier managed are allowed to participate in a VMI relationship.
   - If scope is **Subinventory**, only item subinventories associated with the selected organization that have an inventory planning method of min-max planning or supplier managed are allowed to participate in a VMI relationship.
7. If scope is **Subinventory**, you must select at least one subinventory.

   Note: Item subinventories with the inventory planning method of min-max planning or supplier managed are required for the subinventory to participate in a VMI relationship.

8. Select the default min-max quantity source to determine if the minimum and maximum inventory thresholds are managed by the supplier or the enterprise.

   Note: If inventory planning owner is enterprise, the min-max quantity source of the replenishment item is enterprise.

9. Optionally, select a default requisition requester. This attribute determines who is listed as the requisition requester on the generated purchase requisition. If a value is provided at the relationship level, that value will override the defined requisition requester on the Manage Supply Chain Collaboration Settings page in the Setup and Maintenance work area.
10. Click **Save and Continue** to save the new relationship.

Note: An item can only be managed by single supplier for each organization or subinventory.

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Modify a VMI Relationship

On the Manage VMI Network page, you can modify a vendor-managed inventory (VMI) relationship between suppliers, organizations, and item combinations.

To modify a VMI relationship:

1. In the Supply Chain Collaboration work area, click **Manage VMI Network** in the Tasks panel.
2. On the Manage VMI Network page, search for the VMI relationship.
3. Select a row in the search results and click **Actions > Edit**.
4. On the Edit Relationship page, you can modify the following values:
   - Status
   - Scope

     Note: If you change the scope from Organization to Subinventory, you must select and add subinventories.

   - Subinventories
   - Min-Max Quantity Source
   - Requisition Requester
5. Click **Save and Close**.

Delete a VMI Relationship

On the Manage VMI Network page, you can delete a vendor-managed inventory (VMI) relationship.

To delete a VMI relationship:

1. In the Supply Chain Collaboration work area, click **Manage VMI Network** in the Tasks panel.
2. On the Manage VMI Network page, search for the VMI relationship.
3. Select the relevant row in the search results and click **Actions > Delete**.

Import VMI Relationships from Files

You can import the vendor-managed inventory (VMI) relationships by using the File-Based Data Import mechanism.

1. Download the VMI Relationships file-based data import template from the File-Based Data Import (FBDI) for SCM guide, available on Oracle Help Center.
2. Extract the template to a local drive.
3. Enter the VMI relationship data in the CSV file.
4. Compress the CSV file.
5. Run the Load Interface File for Import scheduled process to load the VMI relationship data from the CSV files.
   a. In the import process, select **Import Vendor-Managed Inventory Relationships** and select the compressed data file.

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      b. If you had previously uploaded a data file to the **scm/vmirelationship/import** account using the File Import and Export page, the file name will appear in the list of data files.

For more details on the file-based data import mechanism, see the File-Based Data Import (FBDI) for SCM guide

Related Topics
- How You Manage VMI Network

Manage VMI Analysts

How You Manage VMI Analysts

As an Oracle Supply Chain Collaboration user, you work with external suppliers and require profiles with security settings that aren't generally available in other Oracle Fusion applications. You can create and manage a vendor-managed inventory (VMI) analyst and associate the VMI analyst with appropriate access to replenishment data for a specific VMI relationship by setting the enterprise data security by organization and supplier context.

Supply Chain Collaboration supports two modes of data security:

- Exclusive data access: Users have access only to the data explicitly granted to them. The exclusive access mode is restrictive. You use the exclusive access mode if all the relationships are confidential and you need to explicitly grant access to users. It is the default access behavior for VMI.

- Inclusive data access: Users have access to all data explicitly granted to them and the data that doesn't have at least one other user assigned. You use the inclusive access mode if most of the relationships are accessible to users and only a few relationships are confidential.

For more information on data access, see the Implementing Manufacturing and Supply Chain Materials Management guide.

On the Manage VMI Analysts page, you can perform the following actions:

- Search for VMI analysts
- Create new VMI analysts
- Modify VMI analysts
- Delete VMI analysts

Note: You must have Supply Chain Application Administrator role to manage VMI analysts.

You can view this page only when vendor-managed inventory data access is enabled. For more information on enabling vendor-managed inventory data access, see the Implementing Manufacturing and Supply Chain Materials Management guide.

Create a VMI Analyst

On the Manage VMI Analysts page, you can create a vendor-managed inventory (VMI) analyst from an existing Oracle Fusion user.

To create a VMI analyst:

1. In the Supply Chain Collaboration work area, click **Manage VMI Analysts** in the Tasks panel.
2. On the Manage VMI Analysts page, click **Actions** > **Create**.
3. On the Create VMI Analyst page, select the VMI analyst from a list of existing Oracle Fusion users.
4. Select one of the following values for **Full Access**:

    - **Yes** to grant access to all replenishment item and request data.

    - **No** to restrict access to specific suppliers or organizations.

5. Select one of the following values for **Status**:

    - **Active** to enable the VMI analyst.

    - **Inactive** to disable the VMI analyst.

6. If **Full Access** is set to **No**, click the **Add** icon to add a new row in the VMI Analyst Security table.
7. Select one of the following values for **Security Context**:

    - **Supplier** to grant access to a specific supplier.

    - **Organization** to grant access to a specific organization.

8. Select the supplier or organization value for **Security Context Value**.

    The values for **Supplier** or **Organization** are filled based on the selected security context.
9. Click **Save and Close** to save the new VMI analyst and return to the Manage VMI Analysts page.

Duplicate a VMI Analyst

On the Manage VMI Analysts page, you can duplicate an existing vendor-managed inventory (VMI) analyst. This can save time when you need to create multiple VMI analysts that differ only in their security context.

To duplicate a VMI analyst:

1. In the Supply Chain Collaboration work area, click **Manage VMI Analysts** in the Tasks panel.
2. On the Manage VMI Analysts page, search for the VMI analyst.
3. Select a row in the search results and click **Actions** > **Duplicate**.
4. On the Create VMI Analyst page, select the VMI analyst from a list of existing Oracle Fusion users.
5. Adjust **Full Access**, **Status**, and **Security Context** if needed.
6. Click **Save and Close** to save the new VMI analyst and return to the Manage VMI Analysts page.

Modify a VMI Analyst

To modify a vendor-managed inventory (VMI) analyst:

1. In the Supply Chain Collaboration work area, click **Manage VMI Analysts** in the Tasks panel.
2. On the Manage VMI Analysts page, search for the VMI analyst.
3. Select a row in the search results and click **Actions** > **Edit**.
4. On the Edit VMI Analyst page, you can modify the following values:

- VMI Analyst
- Full Access
- Status
- Security Context

5. Click **Save and Close** to save the VMI analyst and return to the Manage VMI Analysts page.

Delete a VMI Analyst

To delete a vendor-managed inventory (VMI) analyst:

1. In the Supply Chain Collaboration work area, click **Manage VMI Analysts** in the Tasks panel.
2. On the Manage VMI Analysts page, search for the VMI analyst.
3. Select the relevant row in the search results and click **Actions** > **Delete**.
4. On the warning dialog box to confirm the deletion of the VMI analyst, click **Yes**.
   The VMI Analyst is deleted.

Manage Scheduled Processes

Vendor-Managed Inventory Scheduled Processes

You can use scheduled processes to perform the following vendor-managed inventory tasks:

- Refresh the vendor-managed inventory replenishment data.
- Purge the vendor-managed inventory replenishment request records.

Refresh VMI Replenishment Data

Vendor-managed inventory (VMI) data shared with suppliers is real time and doesn't need to be refreshed. However, some of the summarized data presented to enterprise users must be calculated using the Refresh VMI Replenishment Data scheduled process.

These enterprise views depend on calculated data and should be refreshed periodically:

- Replenishment status and quantities displayed on the Manage Inventory page

  > **Note:** The View Item Details page and the Review Item Transactions page don't require refresh.

- VMI Exceptions infolet

- Requiring Replenishment infolet

By using the Refresh VMI Replenishment Data process, you can filter the data you would need to refresh using the optional process parameters of Organization, Supplier, or Item. This could improve the refresh process and allow

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organizations in different geographical regions to be refreshed on different schedules or allow you to prioritize certain data, refreshing it more often. If all parameters are undefined the entire data will be refreshed.

Enterprise users can also refresh individual replenishment items on demand from the Manage Inventory page. You can use the Last Refresh Date column to determine when the replenishment item was last refreshed.

Purge Vendor-Managed Inventory Replenishment Requests

The replenishment request documents are permanently stored until they are purged. To purge the historical requests, run the Purge Vendor-Managed Inventory Replenishment Requests scheduled process. You must provide a starting point for the purge routine by selecting the request creation date and from date.

For example, you can purge all closed requests that are older than a year by setting the following:

- Request Creation Date: Select on or before
- From Date: Select today's date for last year
- Status: Select Closed

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4 Manage Supply Collaboration

Manage with Oracle Fusion Supply Chain Collaboration

How You Manage Order Forecasts and Commits

You use the Manage Order Forecasts and Commits page to search and view order forecast data and to download and upload the order forecast commits. You can access the Manage Order Forecasts and Commits page from:

- Oracle Supply Chain Collaboration: You can access the order forecast information for all the supplier sites.

  > **Note:** You need the Supply Chain Collaboration Planner role to access the Manage Order Forecasts and Commits page.

  > **Note:** Ensure that Oracle Social Network is enabled for the Manage Order Forecasts and Commits page.

- Oracle Supplier Portal: You can access the order forecast information based on your supplier site.

  > **Note:** You need the Supply Demand Planner role to access the Manage Order Forecasts and Commits page.

Search for Order Forecasts

You can view the order forecasts and their commit data by searching for them on the Manage Order Forecasts and Commits page.

- On the Oracle Supplier Portal, Manage Order Forecasts and Commits page, you can only search for order forecasts that list you as the supplier.
- On the Oracle Supply Chain Collaboration, Manage Order Forecasts and Commits page, you can search for order forecasts based on multiple parameters, such as, the supplier and their corresponding supplier sites.

  > **Note:** All quantities are displayed in the order forecast's collaboration unit of measure. You can set the UOM definition source on the collaboration relationship to set the order forecast's unit of measure.

When using advanced search:

- You can search for all order forecasts across all suppliers that you have access to by using the **Ship-to** field, where the ship-to organization has view access to the order forecast sent to its supplier.
- You can search for order forecasts and commits that support drop ship relationships on the Manage Order Forecasts and Commits page by using the **Drop Ship** attribute. You can aggregate the forecast quantity by collaboration plan, supplier site, item, organization, time bucket, and order type.

Edit Order Forecasts and Commits

You can search for the order forecasts on the Manage Order Forecasts and Commits page, by entering the search parameters and navigating to the Edit Order Forecast Details page to edit the forecast and commit quantities.

1. In the Supply Chain Collaboration work area, click **Manage Order Forecasts and Commits** in the Tasks panel.
2. On the Manage Order Forecasts and Commits page, search for the order forecast.
3. Select a row in the search results and click **Actions** > **Edit**.
4. On the Edit Order Forecast Details page, you can view the order forecast details along with the published on-hand quantity accurate as of the last time the order forecast was published. The order forecast details are listed based on the set aggregation schedule in the Order Forecast Details table.
5. In the Order Forecast Details table, select a cell or a row of cells and click **Actions** > **Edit**.
6. Do one of these:

   - Edit inline to enter the forecast or commit quantity for one cell at a time.

   - Edit multiple cells at once to enter the forecast or commit quantity for all cells in the row.

7. Do one of these:

   a. Click **Actions** > **Publish** to publish the forecast changes to the supplier. You have an option to submit any draft commitments during this action.

      > **Note:** A forecast change is considered a new version of the forecast so commit values will be cleared for the changed buckets.

   b. Click **Actions** > **Commit** to submit draft commit values.

   The updated commit values are now ready to be picked up by planning. The new forecast and commit values are now visible to suppliers and enterprise users.

   Before you commit, you can retain the draft values by clicking **Save** or **Save and Close**. Draft values are saved by user type. Supplier provided draft values aren't visible to the enterprise until the values are committed. Enterprise provided draft values aren't visible to the supplier until the values are committed.

When updating order forecast commit values, if you update the commit quantity for an aggregation, the quantity is stored on the first day of the aggregation time frame. If the first day of the aggregation time frame doesn't exist as a schedule detail, a new schedule detail record will be created for the first day of the bucket.

Edit a Forecast or Commit Quantity Inline

In the Order Forecast Details table, you can enter a numeric value in each Current Forecast or Current Commit cell.

1. On the Manage Order Forecasts and Commits page, search for the order forecast.
2. Select a row in the search results and click **Actions** > **Edit**.
3. On the Edit Order Forecast Details page, the Order Forecast Details table, double-click the **Current Forecast** or **Current Commit** cell that you want to update.
4. Enter a numeric value for the forecast or commit quantity.
5. Click **Save and Close** to save your changes and go back to the Manage Order Forecasts and Commits page.

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Edit Multiple Forecast Values or Commit Values

You can multi-select the current forecasts or current commits for all time buckets displayed in the Order Forecast Details table and enter values for multiple cells at once.

1. On the Manage Order Forecasts and Commits page, search for the order forecast.
2. Select a row in the search results and click **Actions** > **Edit**.
3. On the Edit Order Forecast Details page, in the Order Forecast Details table, select the current Forecast or **Current Commit** row that you want to update and click **Actions** > **Edit**.
4. On the Edit Order Forecast Details page, in the Order Forecast Details table, do one of these to edit the current forecasts or commits:

   a. Select the **Current Forecast** row that you want to update and click **Actions** > **Edit**.

   On the Edit Current Forecasts dialog box, select one of these actions:

      - **Set to previous forecast**: To update all the forecast quantities with their corresponding previous forecast quantities.
      - **Increase by percentage**: To increase the forecast quantities based on the percentage you enter.
      - **Decrease by percentage**: To decrease the forecast quantities based on the percentage you enter.
      - **Set to explicit value**: To update the forecast quantities with the value you enter.

   > **Note:** Forecast and commit quantities can't be blank and must be a positive decimal number greater than or equal to 0 and less than or equal to 99,999,999.

   b. Select the **Current Commit** row that you want to update and click **Actions** > **Edit**.

   On the Edit Current Commits dialog box, select one of these actions:

      - **Set to current forecast**: To update all the commit quantities to their corresponding current forecast quantities.
      - **Set to previous commit**: To update the commit quantities to their corresponding previous commit quantities.
      - **Set to explicit value**: To update the commit quantities to the value you enter.

      > **Note:** To clear the current commit values, use this option and leave the value blank.

5. Click **Save and Close** to update your commit quantities based on the selected action and go back to the Edit Order Forecast Details page.
6. Click **Save and Close** to save your changes and go back to the Manage Order Forecasts and Commits page.

Edit Forecast Values or Commit Values Using a Flat File

You can download the order forecast details into a flat file to analyze and modify the forecast commit data.

In Oracle Supply Chain Collaboration, the Supply Chain Collaboration Planner should have the forecast editing privilege to upload forecast changes. In Oracle Supplier Portal, the Supply Demand Planner must have supplier portal access to the supplier site defined within the item forecast to upload forecasts or commits for the supplier site.

1. On the Manage Order Forecasts and Commits page, search for the order forecast.
2. Select a row in the search results and click **Actions** > **Edit**.
3. On the Edit Order Forecast Details page, click **Actions** > **Download**.
4. In the Download Forecasts dialog box, optionally select values for these attributes and click **Download**:

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Use Notes to Share Comments on Order Forecasts and Commits

You and your supplier can comment on order forecasts and commits through separate notes sections on the Edit Order Forecast Details page. The supplier can respond to your notes on commit. These notes are specific to the plan, supplier, supplier site, ship-to organization, and item combination.

The text in the Notes to Supplier and Notes to Planner fields can also be used to search for a particular forecast and commit on the Manage Order Forecasts and Commits page. When you select the Forecasts notes layout for downloading forecast, the Note to Supplier and Note to Planner fields are included in the downloaded excel sheet. You can also include note to supplier data in the Collaboration Order Forecast file in the Oracle file-based data import.

1.

Field	Description

Layout	Select the layouts for the order forecasts download. Values include:
	
	    ○ **Vertical**: The quantities are listed based on an item-location-time combination.
	
	    ○ **Horizontal**: The quantities are listed based on an item-location-measure combination, with multiple bucket date quantity columns.

Measures	Select the measures to download. Values include Previous Forecast, Previous Commit, Open Purchase Orders, Purchase Requisitions, In-Transit Shipments, and Shipments in Receiving. **Note:** The current forecast and current commit values are always included in the download and can't be selected.
Horizon	Select the type of time period used to set the horizon for the order forecasts download. Values include Forecast or Commit.
Aggregation Level	Select the time buckets used to aggregate the order forecasts download. Values include Day or Week. **Note:** If the layout selected is Horizontal then the only option for aggregation level is Week.
Commit Quantities	Select the commit quantities to include for the order forecasts download. Values include Set to current forecast or Set to previous commit. **Note:** If set, these will override the current commit quantities.

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Field	Description

> **Note:** For more information on setting the default order forecasts and commits values to download, see the Implementing Manufacturing and Supply Chain Materials Management guide.

A .csv file is downloaded with the order forecast information.

2. Open the .csv file in a spreadsheet editor.

> **Note:** When opening a downloaded .csv file containing European characters in Microsoft Excel, import the file using the delimited file type with 65001 : Unicode (UTF-8) as the file origin.

3. Update the values in the **Forecast Quantity** or **Commit Quantity** column.
4. Save and close the .csv file.

   If the .csv file is large, you can compress the .csv file to a .zip file before uploading.
5. On the Manage Order Forecasts and Commits page, click **Actions** > **Upload**.
6. On the File Upload dialog, click **Search File** to search for and select the .csv file or the compressed .zip file that you updated.
7. Click **Submit**.

   The values updated in the .csv file are displayed in the **Current Forecast** or **Current Commit** row.

> **Note:** The format of dates in the .csv file is set in the regional settings.

Edit Multiple Forecast Values or Commit Values Using a Flat File

You can download multiple order forecast details into a flat file to analyze and modify the forecast commit data.

> **Note:** In Oracle Supply Chain Collaboration, the Supply Chain Collaboration Planner should have the forecast editing privilege to upload forecast changes. In Oracle Supplier Portal, the Supply Demand Planner must have supplier portal access to the supplier site defined within the item forecast to upload forecasts or commits for the supplier site.

1. On the Manage Order Forecasts and Commits page, search for the order forecast.
2. Do one of these to download order forecasts:

   ○ Click **Actions** > **Download** > **Download Search Results** for order forecasts in the search results.

   ○ Click **Actions** > **Download** > **Download All Records** for order forecasts that you have access to.

3. In the Download Forecasts dialog box, optionally select values for these attributes and click **Download**:

Field	Description
Layout	Select the layouts for the order forecasts download. Values include: ○ **Vertical**: The quantities are listed based on an item-location-time combination. ○ **Horizontal**: The quantities are listed based on an item-location-measure combination, with multiple bucket date quantity columns.

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Field	Description
Measures	Select the measures to download. Values include Previous Forecast, Previous Commit, Open Purchase Orders, Purchase Requisitions, In-Transit Shipments, and Shipments in Receiving. **Note:** The values for Current Forecast and Current Commit will always be included in the download and can't be selected.
Horizon	Select the type of time period used to set the horizon for the order forecasts download. Values include Forecast or Commit.
Aggregation Level	Select the time buckets used to aggregate the order forecasts download. Values include Day or Week. **Note:** If the layout selected is Horizontal then the only option for aggregation level is Week.
Commit Quantities	Select the commit quantities to include for the order forecasts download. Values include Set to current forecast or Set to previous commit. **Note:** If set, these will override the current commit quantities.

Note: For more information on setting the default order forecasts and commits values to download, see the Implementing Manufacturing and Supply Chain Materials Management guide.

A .csv file is downloaded with the order forecast information.

Note: You can use the Review Scheduled Download Files page to schedule and download large files.

4. Open the .csv file in a spreadsheet editor.

Note: When opening a downloaded .csv file containing European characters in Microsoft Excel, import the file using the delimited file type with 65001 : Unicode (UTF-8) as the file origin.

5. Update the values in the **Forecast Quantity** or **Commit Quantity** column.
6. Save and close the .csv file.

If the .csv file is large, you can compress the .csv file to a .zip file before uploading.

7. Click **Actions** > **Upload**.

8. On the File Upload dialog click **Search File** to search for and select the .csv file or the compressed .zip file that you updated.
9. Click **Submit**.

   The values updated in the .csv file are displayed in the **Current Forecast** or **Current Quantity** column.

> **Note:** The format of dates in the .csv file is set in the regional settings.

Publish Order Forecasts

When you save a forecast value, the value isn't automatically published to Oracle Supplier Portal. You must publish the order forecast to send your changes to Supplier Portal.

A forecast change is considered as a new version of the forecast, so the previous commit values are cleared for the changed order forecast. When you publish the order forecast, you have the option to submit draft commitments.

> **Note:** In Supply Chain Collaboration, the Supply Chain Collaboration Planner should have the Edit Forecasts as Enterprise User privilege to publish forecast changes to Supplier Portal.

Here's how you can publish the order forecasts:

1. On the Manage Order Forecasts and Commits page, search for the order forecast.
2. Select a row in the search results and click **Actions** > **Edit**.
3. On the Edit Order Forecast Details page, click **Actions** > **Publish**.

   The publish action will send the updated current forecasts buckets for the order forecast in context to Supplier Portal.

   These actions occur when publishing order forecast values:

   ○ Orchestration is notified that there are updated forecasts to process.

   ○ Publish action processes this action as a mid-cycle publish update.

   > **Note:** If you publish a forecast before clicking **Save**, it will save the edited forecasts and send the values to Supplier Portal as a mid-cycle update.

Commit Order Forecasts or Commits

When you save an order forecast value, for your changes to be visible in both Supply Chain Collaboration and Supplier Portal, you must commit the order forecast. For example, when you update and save commit quantities in Supplier Portal, they won't be visible in Supply Chain Collaboration until you commit the update.

Here's how you can commit order forecasts or commits:

1. On the Manage Order Forecasts and Commits page, search for the order forecast.
2. Select a row in the search results and click **Actions** > **Edit**.
3. On the Edit Order Forecast Details page, click **Actions** > **Commit**.

Related Topics
- Review Status of Scheduled Download Files
- Manage Preferences

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Commit Multiple Order Forecasts

You can select multiple order forecasts for all time buckets displayed on the Manage Order Forecasts and Commits page and commit to multiple order forecasts at once.

To commit to multiple order forecasts:

1. On the Manage Order Forecasts and Commits page, search for the order forecasts.
2. Select multiple rows in the search results and click **Actions** > **Commit Order Forecasts**.

   > **Note:** When you select multiple rows in the search results, you can no longer edit the order forecasts.

3. On the Commit Order Forecasts dialog box, select one of the following actions:

   ◦ **Set to current forecast**: To update all the commit quantities to their corresponding current forecast quantities.
   ◦ **Set to previous commit**: To update the commit quantities to their corresponding previous commit quantities.
4. Click **Save and Close** to update your commit quantities based on the selected action.

Review Status of Scheduled Download Files

You can review the status of scheduled downloads of a file containing the order forecast details.

To review the scheduled download files:

1. Go to the Manage Order Forecasts and Commits page
2. Click **Actions** > **Download** > **Review Scheduled Download Files**.

   You can review the status of scheduled downloads on the Review Scheduled Download Files page.

Review Status of Uploaded Files

You can review the uploaded files containing the order forecast details from the last 30 days. You can view the upload information, such as upload status and successful or failed item forecast uploads. You can also access the error log, as well as download the previously uploaded files.

To review the scheduled upload files:

1. Go to the Manage Order Forecasts and Commits page.
2. Click **Actions** > **Upload** > **Review Scheduled Upload Files**.

   You can review the uploaded files on the Review Scheduled Upload Files page.

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Export Collaboration Order Forecasts or Commits to Files

You can export the collaboration order forecasts or commits periodically from Supply Chain Collaboration to a CSV file.

To export collaboration order forecasts to files, perform the following steps:

1. Run the **Export Collaboration Order Forecasts** scheduled process to export the order forecast or commit data to a CSV file. You must set the supply plan to export and filter the export collection by specifying a supplier or item. In addition, you can select one or more measures to include in your export data.
2. On the File Import and Export page, select **scm/collaborationOrderForecast/export** account and search for the exported files. The .zip file name is a combination of the plan name and the **Export Collaboration Order Forecasts** scheduled process ID.

   > **Note:** You can also search for a specific file using the **Export Collaboration Order Forecasts** scheduled process ID.

   The .zip file contains three comma-separated files, which contain the collaboration plan data, forecast entries, and the forecast entry details.

Related Topics
- Export Collaboration Order Forecasts

Import Collaboration Order Forecasts

You can import the collaboration order forecasts from an external application by using the File-Based Data Import mechanism. For more information on the File-Based Data Import mechanism, see the File-Based Data Import for Oracle Supply Chain Management Cloud guide.

> **Note:** To create the File-Based Data Import 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 (FBDI) for SCM guide in the Oracle Help Center.

To load collaboration order forecasts from files, perform the following steps:

1. Setup your collaboration relationships on the Manage Supply Collaboration Network page.
2. Create a collaboration plan using the Manage Collaboration Plans page. You must set the supply plan source to **External Application** and provide a supply plan name.
3. Prepare data for collaboration order forecasts. You can download the Collaboration Order Forecast file-based data import template, which are Microsoft Excel template files from the File-Based Data Import for SCM Cloud guide on the Oracle Help Center.
4. Extract the templates to a local drive, enter the appropriate data, and generate CSV files. You can compress the CSV files to a zipped file format.
5. Run the **Load Interface File for Import** scheduled process to load the order forecast data from the CSV files. In the import process, select **Import Collaboration Order Forecasts** and select the data file you would like to import. If had previously uploaded a data file to the **scm/collaborationOrderForecast/import** account using the File Import and Export page, the file name will appear in the list of data files.

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6. Run the **Supply Collaboration Decomposition** scheduled process to decompose the imported order forecast data.

Related Topics
- How You Manage Supply Collaboration Network
- Create a Collaboration Plan

View Purchasing Measures

In a collaboration cycle, contract manufacturers and suppliers continue to procure, ship, and receive goods, which reduce the net quantity that you need to forecast or commit. In addition to the order forecasts, you can view the gross commitment for a given item in a given time bucket along with the purchasing measures, such as, open purchase orders, purchase requisitions, shipments in receiving, and in-transit shipments.

Note: In Oracle Supplier Portal, suppliers can't view the purchase requisition measures.

To view the purchasing measures:

1. In the Supply Chain Collaboration work area, click **Manage Order Forecasts and Commits** in the Tasks panel.
2. On the Manage Order Forecasts and Commits page, search for the order forecast.
3. Select a row in the search results and click **Actions** > **Edit**.
4. On the Edit Order Forecast Details page, you can view the aggregated values for the following purchasing measures in the order forecast details:
   - Open Purchase Orders
   - Purchase Requisitions
   - Shipments In Receiving
   - In Transit Shipments
5. Select an order type and click **Actions** > **View Purchasing Measures**.
6. On the Purchasing Measures page, you can view the breakdown of the purchasing measure.
7. Click the Reference Number value to view the details of the purchasing measure in Oracle Fusion Cloud Procurement.

Note: You can't view the Purchase Requisitions details in Oracle Fusion Cloud Procurement.

Example of Updating Order Forecasts Mid-Cycle

During a planning cycle, if there is a change in the plan data mid-cycle, it will be considered to be an update and any previous commits for that time bucket will be cleared.

For example, you create a collaboration plan with a weekly frequency and the start date set for Monday. If you publish a plan on Monday, January 16, any changes to the published data during the week of January 16 will be considered as an update and will clear any previous commits for that time bucket. The following week, on Monday, January 23, when the plan is published again, it will be treated as a new planning cycle.

The following table shows changes in the plan data when there are changes in the published data mid-cycle:

Date Data Received	Ship-From	Ship-To	Item	Values for Schedule Date 6-Feb	Values for Schedule Date 13-Feb	Values for Schedule Date 20-Feb	Values for Schedule Date 27-Feb
2-Jan-2017	Supplier A	Site A	Y	150 units	150 units	150 units	No Record Sent
4-Jan-2017	Supplier A	Site A	Y	150 units	No Record Sent	300 units	300 units

An order forecast is published on 2-Jan-2017 with a weekly aggregation and Monday as the start date. The schedule is for the weeks of 6-Feb, 13-Feb, 20-Feb, and 27-Feb. On 4-Jan-2017 the decomposition process evaluates each schedule detail and compares it to the previous item forecast received on 2-Jan-2017.

- No update: For the aggregation week of 6-Feb, the decomposition process determines that there is no change to the pre-existing schedule detail. There are no changes in the forecast quantity, so there is no change in the commit quantity.

- Cancel: For the aggregation week of 13-Feb, because no record was sent, the decomposition process will assume the 2/13 bucket has been canceled. The record will be versioned and the forecast quantity will be set to 0. Any commits made will remain.

- Update: For the aggregation week of 20-Feb, because the forecast quantity changed, the decomposition process will create a new up versioned schedule detail record. The record will be versioned and the forecast quantity will be set to 300. A new commit will be expected.

- Add: For the aggregation week of 27-Feb, because the time bucket 27-Feb did not exist previously the decomposition process will create a new schedule detail record. The forecast quantity will be set to 300. A commit will be expected.

When an order forecast is republished, the service level agreement is recalculated. For example, if the service level agreement is 2 days. If the original publish date for the order forecast is 2-Jan the due date is 4-Jan. If the order forecast is republished on 3-Jan the due date is set to 5-Jan.

> **Note:** The forecast data for time buckets in a past date cannot be updated in a mid-cycle update. Those quantities will remain until the end of the planning cycle.

Example of Updating Commits Mid-Cycle

During a planning cycle, if there is a change in the commit quantity mid-cycle, the schedule details are versioned and the commit quantities are updated.

You need not provide commits across all the time buckets at the same time. For example, you can commit buckets 1-3 on Monday and commit buckets 4-8 on Tuesday.

Whenever you cancel a forecast, suppliers will need to resend the bucket they have already sent with the quantity set to 0.

If the supplier commits at a higher aggregation level, the previous commits within the time frame are automatically canceled. New schedule details are created and up-versioned and the commit quantity is set to 0.

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For example, if the commit values are updated during the planning cycle 2-Jan to 3-Jan:

- Commit Version 1 on 2-Jan:

    ○ 6-Feb to 13-Feb: 500

- Commit Version 2 on 3-Jan:

    ○ 6-Feb to 6-Feb: 200
    ○ 8-Feb to 8-Feb: 300
    ○ 6-Feb to 13-Feb: 0 (Version previous commit and set quantity to 0)

Manage Supplier On-Hand Quantities

On the Manage Supplier On-Hand Quantities page, the enterprise and supplier user can upload, search for and view, or delete supplier on-hand quantities for inventory items for the participating supplier sites.

> **Note:** The supplier on-hand quantities are displayed in the published unit of measure as well as the item's primary unit of measure.

Upload Supplier On-Hand Quantities

On the Upload Supplier On-Hand Quantities page, you can upload supplier on-hand quantities for your items. You can monitor the status of the upload process and view any errors that may have occurred.

To upload supplier on-hand quantities:

1. In the Supply Chain Collaboration work area, click **Manage Supplier On-Hand Quantities** in the Tasks panel.
2. On the Manage Supplier On-Hand Quantities page, click **Actions** > **Upload**.
3. On the Upload Supplier On-Hand Quantities page, click **Actions** > **Download Template** to download a blank template.
4. Open the .csv file in a spreadsheet editor. Add the values and save and close the .csv file.
5. On the Upload Supplier On-Hand Quantities page, click **Actions > Upload**.
6. In the File Upload dialog box, click **Choose File** to search for the .csv file that you updated.
7. Click **Submit**.

    You can view the status of the uploaded file and review the error messages, if any, on the Upload Supplier On-Hand Quantities page. The uploaded file will be available for 30 days.

Delete Supplier On-Hand Quantities

To delete the supplier on-hand quantities:

1. In the Supply Chain Collaboration work area, click **Manage Supplier On-Hand Quantities** in the Tasks panel.
2. On the Manage Supplier On-Hand Quantities page, search for the supplier on-hand quantity by using the supplier, supplier site, supplier item, or the item.
3. Select a row in the search results and click **Actions** > **Delete**.

Overview of Orchestration

The orchestration process publishes the order forecasts to the suppliers through Oracle Supplier Portal, Business to Business (B2B) messaging using Oracle Collaboration Messaging Framework, or web services.

> **Note:** The Item Forecast orchestration processes are grouped by collaboration plan and whether the plan is managed or B2B Only.

The orchestration process will be active until it expires based on the planning cycle end date or B2B Only expiration period. The following predefined orchestration processes are supported:

- **Vcs_SupplyPlanning_Managed**: This process is used for supply planning managed forecast collaboration. The process does the following:

    a. The forecast is published to Supplier Portal and sent to Collaboration Messaging Framework if applicable.
    b. When a commit is received, commit exceptions are run and commit decomposition initiated.
    c. When the planning cycle expires, all the records are marked with the Expired status and the Is_CURRENT_FLAG is set to N.

  This figure provides an overview of the Vcs_SupplyPlanning_Managed process.

Vcs_SupplyPlanning_Managed Process

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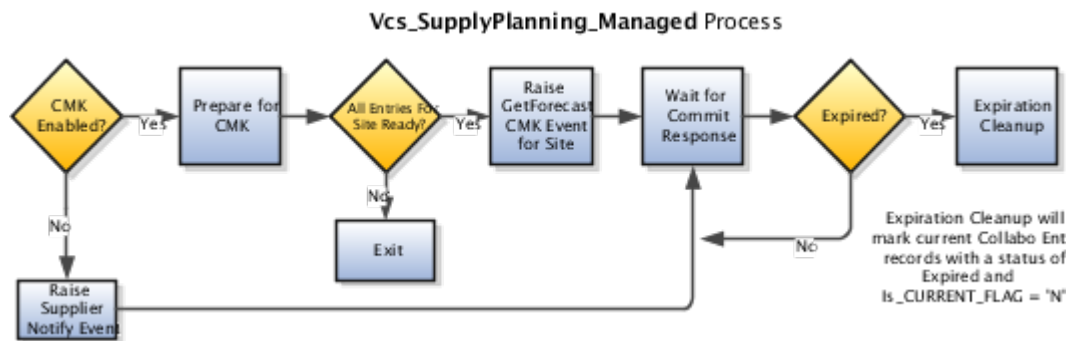
- **Vcs_SupplyPlanning_Unmanaged**: This process is used for Supply Chain Collaboration supply planning B2B Only forecast collaboration. The process does the following:

  a. The forecast is sent to Collaboration Messaging Framework. If the supplier site isn't enabled for Collaboration Messaging Framework, an error event will be generated.

  b. When a commit is received, commit decomposition initiated.

  c. When the planning cycle expires, all the records are marked with the Expired status and the Is_CURRENT_FLAG is set to N. These records are deleted during the next decomposition cycle.

  This figure provides an overview of the Vcs_SupplyPlanning_Unmanaged process.
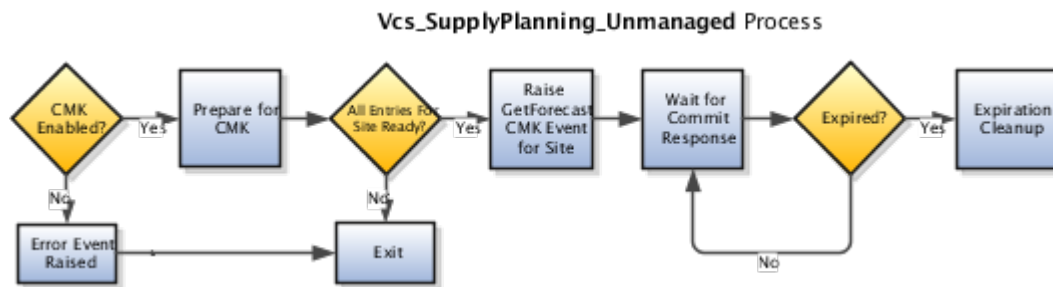
Synchronize Externally Managed Supply Data with Supply Planning

How You Synchronize Externally Managed Supply Data with Supply Planning

As an enterprise user, you can enable your external manufacturers to digitally synchronize their end item and component on-hand balances, purchase order details, work order demands, work order supplies, and work order resources with Oracle Supply Planning by using the Upload Supply Data page. This will enhance your end-to-end supply visibility while ensuring that you and your trading partners can now react quickly to any upstream supply chain disruptions.

To upload externally managed supply data to Supply Planning, you can use these existing file-based data import templates.

- Supply Chain Planning Purchase Order Requisitions

- Supply Chain Planning Supply On Hand

- Supply Chain Planning Work Order Component Demands

- Supply Chain Planning Work Order Operation Resources

- Supply Chain Planning Work Order Supplies

The uploaded files are processed by the Load Supply Data for Externally Managed Organizations scheduled process and the supply data is loaded to the staging database tables.

The supply data is further process by the collections scheduled process to collect the supply data and populate the Supply Planning transaction database tables.

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Note: You can use the Collaboration Supply Data Uploads REST resource to create requests to upload supply data to Supply Planning. Additionally, you can retrieve supply data requests to review the status and any errors encountered. For more information, see the create supply data upload requests use case in the REST API for Oracle Fusion Cloud SCM guide.

Related Topics

- Supply Planning Data Inbound Message

Upload Externally Managed Supply Data

Use the Upload Supply Data page to upload externally managed supply data to Supply Planning. You can monitor the status of the upload process and view any processing and collection errors that may have occurred.

1. Use the existing file-based data import templates to prepare the information for the supply data and compress the files to a .zip file.
2. In the Supply Chain Collaboration work area, click **Upload Supply Data** in the Tasks panel.
3. On the Upload Supply Data page, click **Actions** > **Upload**.
4. In the File Upload dialog box, click **Choose File** to search for the .zip file that you created.
5. Click **Submit**.

   You can view the status of the uploaded file and review the processing and collection error messages, if any, on the Upload Supply Data page. The uploaded file will be available for 30 days.

View Uploaded File Status

On the Upload Supply Data page, you can view the uploaded files and monitor the status of the upload process and view any errors that may have occurred.

- To view the processing error messages, if any, click Yes in the Processing Errors column. The details of the processing and collection errors are displayed in the Errors section.

- In case the file couldn't be uploaded, click Yes in the File Load Errors column to view the object types that failed.

- Once the data moves to the Supply Planning tables, in case of any collection errors, select the row to view collection errors, if any in the Errors section.

Manage with Oracle Fusion Supplier Portal

How You Manage with Oracle Fusion Supplier Portal

In Oracle Supplier Portal, supply chain collaboration is tracked and managed at the level of an order forecast for the supplier sites the supplier user has access. Supplier Portal Overview work area provides suppliers a quick glance across transaction flows and highlights urgent tasks which are relevant to a user's job role.

To access the page, select **Supplier Portal** in the Navigator in the Oracle Fusion application.

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Commit Order Forecasts

On the Oracle Supplier Portal - Manage Order Forecasts and Commits page, you can search for the order forecasts by entering the search parameters and navigating to the Edit Order Forecast Details page to edit the commit quantities.

As a supplier you can view only the order forecasts that are associated with you in Supplier Portal. If you're setup as a contract manufacturer, you can be enabled to view, adjust forecast quantities, or provide commits on behalf of your upstream suppliers.

Related Topics
- Edit Order Forecasts and Commits
- Enable Contract Manufacturers to Manage Order Forecasts on Behalf of Upstream Suppliers

View Order Forecasts for Upstream Suppliers

Contract manufacturers who have been enabled to manage order forecasts for their upstream suppliers can access order forecasts using the Oracle Supplier Portal Manage Order Forecasts and Commits page. You can search for an upstream supplier's order forecasts by specifying your upstream supplier in the search parameters and navigating to the Edit Order Forecast Details page. On the Edit Order Forecast Details page, you can view, adjust forecast quantities, or provide commits on behalf of your upstream supplier.

Note: Depending on the collaboration relationship access settings, you may have permission to either adjust forecast quantities or provide commits on behalf of your upstream supplier.

Related Topics
- Enable Contract Manufacturers to Manage Order Forecasts on Behalf of Upstream Suppliers

How You Upload Supply Data For External Organizations

Contract manufacturers can initiate a supply data request in Oracle Supplier Portal to synchronize their end item and component on-hand balances, purchase order details, work order demands, work order supplies, and work order resources with Oracle Supply Planning by using the Upload Supply Data page. This will enhance the end-to-end supply visibility while ensuring that the trading partners can now react quickly to any upstream supply chain disruptions.

To upload data to Supply Planning, you can use these existing file-based data import templates.

- Supply Chain Planning Purchase Order Requisitions
- Supply Chain Planning Supply On Hand
- Supply Chain Planning Work Order Component Demands
- Supply Chain Planning Work Order Operation Resources

- Supply Chain Planning Work Order Supplies

The uploaded files are processed by the Load Supply Data for Externally Managed Organizations scheduled process and the supply data is loaded to the staging database tables.

The supply data is further process by the collections scheduled process to collect the supply data and populate the Supply Planning transaction database tables.

Related Topics
- Upload Externally Managed Supply Data
- View Uploaded File Status

Reports

Overview of Waterfall Reports

Supply Chain Collaboration Planners need to understand the order forecasts and supplier commitment changes over time to address supply volatility and ensure supplier accountability. Waterfall analysis is used to evaluate the cumulative effect of supplier commits against a forecast over time. The waterfall reports provide the Collaboration Planner an indicator of the quality of the supplier's forecast and commit adherence for a given item forecast across multiple versions. As Oracle Planning Central or Oracle Fusion Cloud Supply Chain Planning publish new versions of order forecasts, Oracle Supply Chain Collaboration saves the previous version and the associated commits for analysis and reporting. With complete visibility, versioning, and audit trail, enterprises can work to continuously improve the collaboration process with their trading partners.

In Supply Chain Collaboration, you can view the following waterfall reports:

- Relationship by item
- Supplier by item
- Supplier site by item
- Ship to by item
- Item

In waterfall reports, you can view order forecasts and commits in alternate units of measure (UOM) rather than just the item's primary UOM. Use the **Reporting UOM Prompt** in the Supply Chain Collaboration - Supply Planning Real Time subject area to update all waterfall reports to display the order forecasts and commits in the selected UOM.

For more information about subject areas, see the Subject Areas for Transactional Business Intelligence in SCM guide.

Order Forecast Waterfall by Relationship

In this report, you can view the aggregated forecast and commit quantities for a supplier site, ship to, and item per collaboration cycle.

Order Forecast Waterfall by Supplier

In this report, you can view the aggregated forecast and commit quantities for a supplier per collaboration plan, collaboration cycle, and item.

Order Forecast Waterfall by Supplier Site

In this report, you can view the aggregated forecast and commit quantities for a supplier site per collaboration plan, collaboration cycle, and item.

Order Forecast Waterfall by Ship To

In this report, you can view the aggregated forecast and commit quantities for a ship to organization per collaboration plan, collaboration cycle, and item.

Order Forecast Waterfall by Item

In this report, you can view the aggregated forecast and commit quantities for an item per collaboration plan and collaboration cycle.

Forecast Record Details

In this report, you can view the record details for a specific forecast record.

Forecast Version Details

In this report, you can view the version details for a specific forecast record.

Commit Record Details

In this report, you can view the record details for a specific commit record.

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Commit Version Details

In this report, you can view the version details for a specific commit record.

Overview of Historical Performance Reports

Historical understanding of supplier commitment deviations will help an enterprise analyze the supplier's performance and accountability, and help ensure that the demand for finished goods is met on time. The historical performance reports show the percentage of order forecasts fulfilled by a supplier, their variability over time, and their average response time. This information is prepared based on the order forecasts and commits of previous versions that are saved for analysis and reporting purposes. The enterprise can view and analyze predefined historical performance reports aggregated by collaboration plan, supplier, ship to, and item, as well as, select and display data for the previous collaboration cycle or all collaboration cycles.

Historical Performance by Collaboration Plan

In this report, you can view the commit cycle times and commit to forecast performance of the previous collaboration cycle or all collaboration cycles for a collaboration plan.

Historical Performance by Item

In this report, you can view the commit cycle times and commit to forecast performance of the previous collaboration cycle or all collaboration cycles for an item.

Historical Performance by Ship To

In this report, you can view the commit cycle times and commit to forecast performance of the previous collaboration cycle or all collaboration cycles for a ship-to organization.

Historical Performance by Supplier

In this report, you can view the commit cycle times and commit to forecast performance of the previous collaboration cycle or all collaboration cycles for a supplier.

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Set Up Supply Chain Collaboration Reports

Before reports are available to use, you have to setup the reports for them to be visible in the Shared Reports and Analytics folder in the Reports and Analysis panel.

To setup reports:

1. In the Supply Chain Collaboration work area, click the **Edit Settings** icon in the Reports and Analytics panel.
2. In the Edit Settings dialog box, click **Select and Add**.
3. In the Select and Add: Reports and Analytics dialog box, expand Report Name.
4. Select the report that you want to add and click **Apply** and then click **OK**.
5. In the Edit Settings dialog box, click **Save and Close**.

View Supply Chain Collaboration Reports

To view reports:

1. In the Supply Chain Collaboration work area, expand **Shared Reports and Analytics** in the Reports and Analysis panel.
2. Click the report you want to view and select **View**.
3. On the report page, select the required parameters and click **Apply**.

Overview of OTBI for Supply Chain Collaboration

Oracle Transactional Business Intelligence (OTBI) offers you real-time, self-service reporting from Oracle Supply Chain Collaboration. It is a dynamic reporting layer built keeping the business user in mind.

You can create and view OTBI analysis using **Reports and Analytics** from the Supply Chain Collaboration work area, or by using Oracle BI Application. You can also select **Reports and Analytics** option from **Tools** on the Home page.

> **Note:** The OTBI Supply Chain Collaboration subject area and reports don't support supply plans with organizations and items collected from an external source system. For supply plans collected from an external source system, use Oracle Fusion Supply Chain Planning analytics.

As a collaboration planner, you can access the Supply Chain Collaboration-related OTBI subject areas. You can view the analysis only for suppliers that you have access to.

OTBI provides the following Supply Chain Collaboration subject area, which you can use to build user-defined analysis:

- Supply Chain Collaboration - Supply Planning Real Time

The dimensions and facts in this subject area provide you visibility to supply planning transactions.

For more information, see the Creating and Administering Analytics and Reports for SCM guide.

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Send Notifications to Buyers or Item Planners When a Supplier Commits

In this example, an Oracle Transactional Business Intelligence Cloud (OTBI) agent can notify buyers or item planners when a supplier commits. OTBI agents can be scheduled to analyze and send an alert or email to authorized users such as buyers or planners based on the results of the analysis.

You can use the Supplier Commit Mismatch Notification to Buyer example analysis to investigate the notification option. The example is available in Oracle Transactional Business Intelligence Catalog under Shared Folders > Supply Chain Management > Supply Chain Collaboration > Transactional Analysis Samples > Supply Planning > Report Components.

This example analysis displays notifications to a buyer when a supplier commits to a forecast within the last hour where Current Commit to Forecast Percent for any order forecast is less than 100.

Let's look at the steps to use the Supplier Commit Mismatch Notification to Buyer example analysis.

> **Note:** Buyers and planners must have the appropriate data access security in Oracle Supply Chain Collaboration and the Supply Chain Collaboration Transaction Analysis Duty role to receive supplier commit notifications from this analysis.

Create an Agent

To create an agent:

1. In Oracle Transactional Business Intelligence work area, click **New** and then select **Agent**.
2. On the Agent page, the General tab, set **Run As** to **Recipient**.
3. On the Schedule tab, select the agent and schedule to run every 60 minutes.
4. On the Condition tab, set **Settings** to **Use a condition**, select the Supplier Commit Mismatch Notification to Buyer analysis, and ensure that the condition is set as True If Row Count is greater than 0.
5. On the Delivery Content tab, enter a subject to display in the notification, set **Content** to **Condition Analysis** and set **Delivery** to Deliver results directly for this example.
6. On the Recipients tab, select Get recipients from the Analysis Used in the Agent Condition, add a buyer user name to Column Containing Recipients and select Only Return Rows Relevant to the User Running the Agent.

   > **Note:** You need the BI Administrator role to use the Get recipients from the Analysis Used in the Agent Condition agent feature.

   > **Note:** The user name must be converted to uppercase in the analysis for the Agent to resolve to the correct user for notifications to work correctly.

Adjust Notifications

You can adjust how often buyers are notified of supplier commits by setting the analysis' filter for Committed Date and the Agent schedule to your desired time interval.

If you want to notify the planners, you can update the analysis in to include Planner and remove the buyer, and update the Agent's recipients to the planner user name.

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Adjust Commit to Forecast Percent Filter

You can set the Current Commit to Forecast Percent filter in the analysis. For example, if you want to be notified about only the commits to forecast that are less than 75%, you can change the analysis Current Commit to Forecast Percent filter to less than 75.

For more information about agents, see Delivering Content in Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition.

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5 Manage Vendor-Managed Inventory

Manage with Oracle Fusion Supply Chain Collaboration

How You Manage VMI with Supply Chain Collaboration

Vendor-managed inventory provides end-to-end visibility to the supplier managed replenishment process. It allows the enterprise to monitor replenishment status and inventory levels. In addition, it provides a view into the procure to pay process by providing quick access to downstream transaction documents related to the replenishment item.

The analyst has access to the following pages:

- Manage Inventory
- Manage Replenishment Requests

Manage Inventory

How You Manage Inventory with Supply Chain Collaboration

You use the Manage Inventory page to view:

- Replenishment status
- Minimum and maximum inventory thresholds
- Current on-hand inventory quantities
- Replenishment measures
- Replenishment data refresh
- Replenishment item details
- Historical replenishment item transactions

| **Note:** You must have the Vendor-Managed Inventory Analyst role to access the Manage Inventory page.

Replenishment Status

On the Manage Inventory page, you can search for an item by entering the search parameters to see the replenishment status for the items you manage.

Status Meter Gauge

With the status meter gauge, you have a visual indicator of your replenishment item's status. There are quantities that make up the status gauge. These quantities are also available as separate columns for export.

- The on-hand quantity represents the total quantity of an item stored at either the organization or the subinventory.

- The on-order quantity includes the sum of replenishment requests, purchase requisitions, open purchase orders, shipments, and receipts. The on hand and on order quantities, are added to become the projected on-hand quantity and is compared against the minimum and maximum quantities to give you the replenishment status.

With this comparison, replenishment can have one of these statuses:

- Out of stock: If the available quantity is less than 0.

- In stock: If the minimum and maximum quantity is null or if the available quantity is greater than the minimum quantity.

- Stock above maximum: If the available quantity is greater than the maximum quantity.

- Stock below minimum: If the available quantity is less than the minimum quantity.

This figure illustrates the rules for replenishment status:

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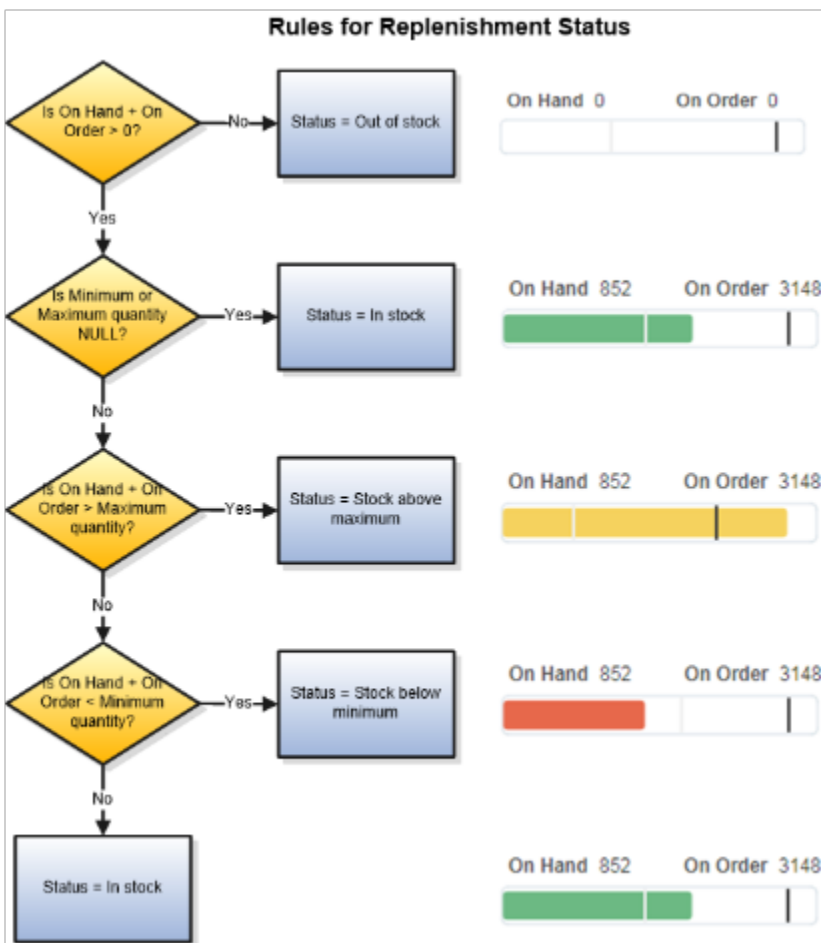
Requiring Replenishment

With requiring replenishment, you can return all replenishment items that must be replenished in order to avoid a stock out. You can also use this criterion to return items that don't have minimum and maximum quantity thresholds defined.

The rules for requiring replenishment include these steps:

1. If the minimum quantity for the item is null, then replenishment is unknown, and requiring replenishment will return the Missing min-max quantities error.
2. If the minimum quantity is 0, then replenishment isn't required.

   > **Note:** Setting the minimum quantity to 0, you can temporarily suspend replenishment of an item.

3. If the projected on-hand quantity is greater than the minimum quantity, then replenishment isn't required.
4. If the projected on-hand quantity is less than the minimum quantity, then replenishment is required.

This figure illustrates the rules for requiring replenishment:
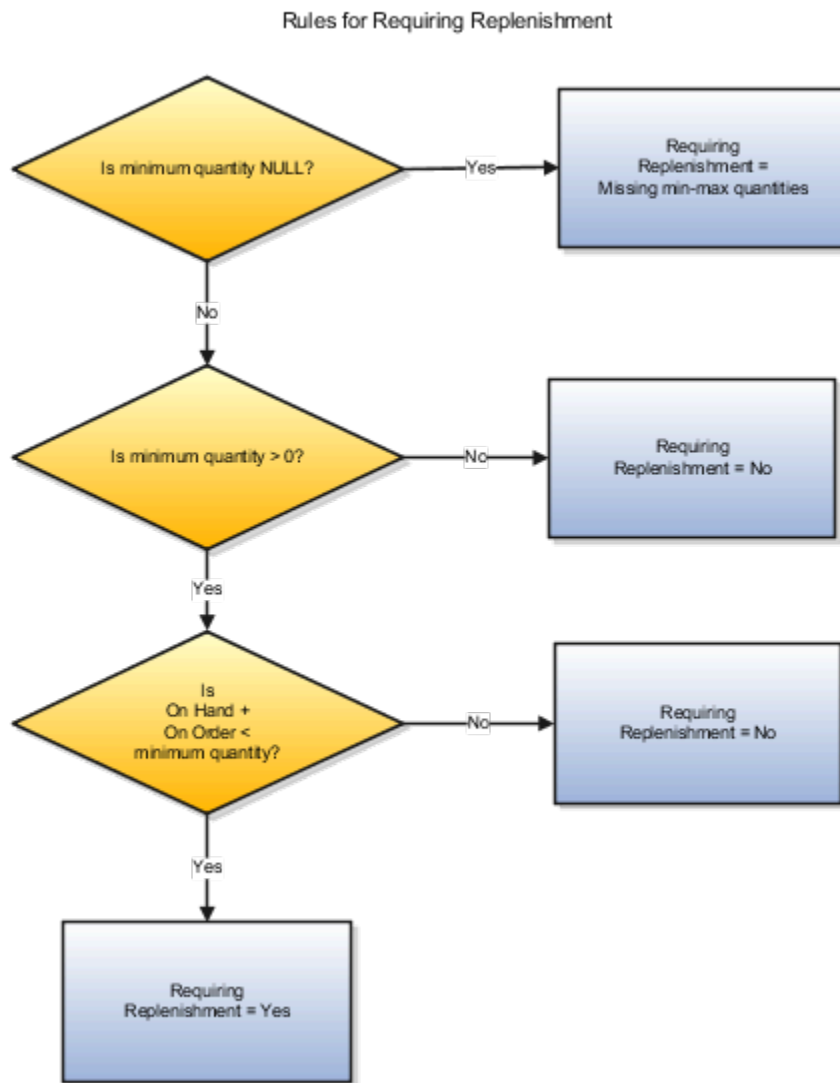
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Rules for Requiring Replenishment

```
┌─────────────────────────┐                    ┌──────────────────────────┐
│  Is minimum quantity     │────Yes────────────▶│    Requiring             │
│       NULL?              │                    │    Replenishment =       │
└─────────────────────────┘                    │    Missing min-max       │
           │                                    │    quantities            │
           No                                   └──────────────────────────┘
           │
           ▼
┌─────────────────────────┐                    ┌──────────────────────────┐
│  Is minimum quantity     │────No─────────────▶│    Requiring             │
│       > 0?               │                    │    Replenishment = No    │
└─────────────────────────┘                    └──────────────────────────┘
           │
          Yes
           │
           ▼
┌─────────────────────────┐                    ┌──────────────────────────┐
│         Is              │────No─────────────▶│    Requiring             │
│      On Hand +          │                    │    Replenishment = No    │
│      On Order <         │                    └──────────────────────────┘
│   minimum quantity?     │
└─────────────────────────┘
           │
          Yes
           │
           ▼
┌─────────────────────────┐
│    Requiring            │
│    Replenishment = Yes  │
└─────────────────────────┘
```

Minimum and Maximum Inventory Thresholds

The minimum and maximum inventory thresholds are required to determine the replenishment status. The min-max quantity source defined on the vendor-managed inventory (VMI) relationship determines whether the enterprise or supplier manages these thresholds.

As an enterprise user, you can't set the minimum and maximum quantities for an item in the Oracle Supply Chain Collaboration work area. For items whose min-max quantity source is enterprise, you set the minimum and maximum quantities on the item or item subinventory records. If VMI relationship scope is organization, you set the min-max quantities on the item record in Oracle Product Information Management. If VMI relationship scope is subinventory, you set the min-max quantities on the item subinventory record in Oracle Fusion Cloud Inventory Management. The

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min-max quantities can be manually updated or calculated using the Calculate Min-Max Planning Policy Parameters scheduled process.

To learn more about calculating min-max quantities, see the Using Inventory Management guide.

For items whose min-max quantity source is supplier, the supplier manages the minimum and maximum quantities in Oracle Supplier Portal.

> **Note:** You can quickly find items that are missing min-max quantities using the Requiring Replenishment search criteria.

Related Topics
- Manage Minimum and Maximum Inventory Thresholds

On-Hand Quantity

The Manage Inventory page provides visibility to the replenishment item on-hand inventory balances. The on-hand quantities are maintained in Oracle Fusion Cloud Inventory Management. The on-hand quantity represents the total quantity of an item stored at either the organization or the subinventory level, depending on how the relationship is defined. When the scope of a relationship is organization, the on-hand quantity is a sum of all storage subinventories within the organization. When the scope of a relationship is subinventory, the on-hand quantity only reflects a single storage subinventory.

The on-hand and on-order quantities are added to become the projected on-hand quantity that is used to evaluate replenishment status.

Refresh Replenishment Data

On the Manage Inventory page, you can search for an item by entering the search parameters and see the last time the data was refreshed and refresh it, if required.

To refresh the data:

- Run the Refresh VMI Replenishment Data scheduled process.
- Select the replenishment item row on the Manage Inventory page and click **Actions** > **Refresh Replenishment Data**. This method is useful if you're working with a supplier and want to ensure one or a few items have been updated in between running the scheduled process.

> **Note:** In Oracle Supply Chain Collaboration work area, only data on the Manage Inventory page, VMI Exceptions infolet, and Requiring Replenishment infolet is a snapshot and needs to be periodically refreshed. The View Item Details page, the Review Item Transactions page, and the pages in the Oracle Supplier Portal work area display real-time data and do not need to be refreshed.

To refresh VMI data for a selected replenishment item:

1. In the Supply Chain Collaboration work area, click **Manage Inventory** in the Tasks panel.
2. On the Manage Inventory page, search for the item.
3. Add the **Last Refresh Date** column to the search results to see the last time the item was refreshed.
4. Select the relevant row in the search results and click **Actions** > **Refresh Replenishment Data**.

   The data for the replenishment item is refreshed and the Last Refresh Date is updated.

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Related Topics
- Refresh VMI Replenishment Data

View Replenishment Item Details

On the Manage Inventory page, you can search for an item by entering the search parameters and navigating to the View Item Details page to view the details of the item.

On the View Item Details page, you can:

- View in-flight purchase orders and the life cycle quantity for each one
- View orders pending change approval and pending supplier acknowledgment
- Drill to purchase order details and order life cycle in Oracle Fusion Cloud Procurement

To view the details of an item:

1. In the Supply Chain Collaboration work area, click **Manage Inventory** in the Tasks panel.
2. On the Manage Inventory page, search for the item.
3. Select the relevant row in the search results and click **Actions** > **View Item Details**.

   The View Item Details page displays the purchase order details of the item.

View Replenishment Item Transactions

On the Manage Inventory page, you can search for the items by entering the search parameters and navigating to the Review Item Transactions page to review the transaction details of an item.

The Review Item Transactions page displays the request, requisition, purchase order, shipment, receipt, invoice, and payment transactions of the replenishment item from the last 7, 30, 90, or 120 days. Each document in the life cycle is linked to allow navigation for more detail.

To review the transaction details of an item:

1. In the Supply Chain Collaboration work area, click **Manage Inventory** in the Tasks panel.
2. On the Manage Inventory page, search for the item.
3. Select the relevant row in the search results and click **Actions** > **Review Item Transactions**.

   The Review Item Transactions page displays the transactions for the item.

Manage Replenishment Requests

How You Manage Replenishment Requests

The Manage Replenishment Request page allows the enterprise users to monitor the progress of each replenishment request submitted by suppliers. It provides end-to-end visibility to all the downstream transaction documents related to the request, which includes the purchase requisition, purchase order, shipment, receipt, invoice, and payment. You can drill down to the relevant document to access additional details.

You can determine where requests are within their life cycle by using the Replenishment Life Cycle search criteria. It includes the following statuses:

- Pending request approval: The replenishment request is waiting to be approved by the enterprise.

- Pending shipment: The purchase order is approved and awaiting shipment

- Pending receipt: Shipments are in-transit and have yet to be received

- Pending delivery: Shipments are in receiving and awaiting delivery

> **Note:** The values for deliver-to location and purchase requisitions are visible only to enterprise users.

Related Topics
- Replenishment Request Statuses

Replenishment Requests

Replenishment requests are documents used by the supplier to initiate the replenishment process for items they manage. Submitted requests are then used to create externally managed purchase requisitions within Oracle Fusion Cloud Procurement.

The replenishment request document contains the following attributes:

- Item

- Organization

- Subinventory

- Supplier Site: This is optional

- Quantity

- Delivery Date

- Notes: This is optional. If you enter a value, it will appear as a note to buyer on the purchase requisition

For more information about externally managed purchase requisitions, see the Oracle Procurement Cloud Using Procurement guide.

> **Note:** Replenishment requests can only be created by suppliers when the inventory planning owner of the replenishment item is supplier. Enterprise users cannot create replenishment requests. For items whose inventory planning owner is enterprise, purchase orders are created using existing methods, such as manually in Oracle Fusion Cloud Purchasing or using the min-max planning report in Oracle Fusion Cloud Inventory Management.

Replenishment Request Statuses

Here's the list of statuses that a vendor-managed inventory (VMI) replenishment request has:

Status	Description
Submitted	The supplier submits the replenishment request. A scheduled process runs to transform the request into a requisition. In process Your replenishment request is in the process of transforming into an externally managed purchase requisition.
Requested	Your requisition is approved and created, but your purchase order is not yet created for the associated requisition number. If the purchase agreement for this item does not automatically generate purchase orders, you can use Process Requisitions in the Procurement work area to process the purchase requisition.

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Status	Description
	Note: To learn more about processing requisitions, see the Oracle Procurement Cloud Using Procurement guide.
In review	Your purchase order is created and awaiting buyer approval.
Closed	Your purchase order is approved and replenishment request status is closed.
Failed	The purchase requisition creation process failed due to missing configuration data. Click Failed to see the errors that caused the replenishment request to fail and correct any setup issues that caused the errors. **Note:** You can view the errors for a failed purchase requisition only in Oracle Supply Chain Collaboration.
Canceled	The buyer or supplier canceled the purchase order. Rejected The buyer returned the purchase requisition or rejected the purchase order.

Manage with Oracle Fusion Supplier Portal

How You Manage VMI with Supplier Portal

Vendor-managed inventory provides end-to-end visibility to the supplier managed replenishment process. It allows the supplier to monitor replenishment status and inventory levels. The supplier can initiate the replenishment process by submitting replenishment requests. In addition, it provides a view into the procure-to-pay process by providing the supplier quick access to downstream transaction documents related to the replenishment item.

The supplier has access to the following pages for vendor-managed inventory:

- Manage Inventory
- Manage Replenishment Requests

Manage Inventory

How You Manage Inventory with Supplier Portal

You use the Manage Inventory page to view:

- Replenishment status

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- Minimum and maximum inventory thresholds

- Current on-hand inventory quantities

- Replenishment measures

- Replenishment data refresh

- Replenishment item details

- Historical replenishment item transactions

Suppliers can also manage min-max quantity thresholds, create replenishment requests and create advance shipment notices (ASN).

> **Note:** On the Manage Inventory page, suppliers can only manage the items assigned to them.

Replenishment Measures

On the Manage Inventory page, suppliers can search for an item by entering the search parameters to see aggregated replenishment measures.

The aggregated quantities are available for the following measures:

Measure	Description
Pending Acknowledgment	The open purchase order quantity that requires supplier acknowledgment. Select this quantity to open the View Item Details page that displays only purchase orders that are pending supplier acknowledgment.
Replenishment Quantity	The replenishment request quantity that is currently pending request approval by the enterprise. Select this quantity to open the Manage Replenishment Requests page that displays only the replenishment requests that are pending request approval.
Purchase Order Quantity	The open purchase order quantity that is awaiting shipment. Select this quantity to open the View Item Details page that displays only the purchase orders pending fulfillment. > **Note:** > If a change order is pending, a warning icon will appear beside this quantity.
In-Transit Quantity	The shipped quantity that is yet to be received. This quantity is derived using advanced shipment notices. Select this quantity to open the Manage Shipments page in Oracle Supplier Portal work area.
Received Quantity	The quantity is received and awaiting delivery. Select this quantity to open the View Item Details page that displays only the purchase orders with quantity in receiving.

These quantities are calculated in real-time and allow the supplier to immediately see changes as they initiate requests and shipments.

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Manage Replenishment Requests

As a supplier, you can create replenishment requests using the Manage Inventory page. You can create a single request for a given replenishment item or upload multiple requests using spreadsheets.

Create a Replenishment Request

On the Manage Inventory page, you can search for an item by entering the search parameters and opening the Create Replenishment Request dialog to create a replenishment request.

To create a replenishment request:

1. In the Supplier Portal work area, click **Manage Inventory** in the Tasks panel.
2. On the Manage Inventory page, search for the item.
3. Select an item in the search results and click **Actions** > **Create Replenishment Request**.
4. On the Create Replenishment Request dialog box, values for **Item**, **Organization**, **Subinventory** is pre-populated using the context of the item selected.
5. Select **Supplier Site**. This is optional.

   Note: The supplier will only be able to select supplier sites they have access to view. If not selected, the supplier site will be defined by the enterprise purchase order process.

6. Enter **Quantity**
7. Adjust the **Delivery Date** if current date isn't preferred
8. Enter **Notes**. This is optional. If you enter notes, it will appear as a note to buyer on the purchase requisition
9. Click **Submit**.

   A confirmation will appear letting you know that the request was successfully submitted.
10. Click **OK**
11. Click **View** > **Refresh**. The Replenishment Quantity column will include the additional quantity. Select this quantity to open the Manage Replenishment Requests page that displays only the replenishment requests that are pending request approval.

   Note: The replenishment requests can only be created by suppliers when inventory planning owner of the replenishment item is supplier.

Upload Replenishment Requests

On the Manage Inventory page, you can upload replenishment requests using spreadsheets.

To upload replenishment requests:

1. In the Supplier Portal work area, click **Manage Inventory** in the Tasks panel.
2. On the Manage Inventory page, click **Actions** > **Upload Replenishment Requests**.
3. On the Upload Replenishment Requests page, click **Actions** > **Download Template**.
4. On the Download Template dialog box, select **Seed Data** and click **OK**.

   Note: You can choose to download a blank template or pre-populate your template. You can include all records or filter the predefined data by Organization, Subinventory, Ship-to Location, Item, or Item Category.

   A .csv file is downloaded with the selected predefined data.
5. Open the .csv file in a spreadsheet editor.

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6. Update the values in the Quantity, Delivery Date and Notes columns. Notes are optional.
7. Save and close the .csv file.
8. On the Upload Replenishment Requests page, click **Actions** > **Upload**.
9. On the File Upload dialog, click **Choose File** to search for the .csv file that you updated.
10. Click **Submit**.
11. Click **Done** to go back to the Manage Inventory page.
12. Click **View** > **Refresh**. The Replenishment Quantity column will include the additional quantity. Select this quantity to open the Manage Replenishment Requests page that displays only the replenishment requests that are pending request approval.

The Upload Replenishment Request page allows suppliers to view the status of the upload and review error messages, if any. The uploaded file will be available for 30 days.

Manage Minimum and Maximum Inventory Thresholds

The minimum and maximum inventory thresholds are required to determine the replenishment status. The minimum and maximum quantity source defined on the vendor-managed inventory (VMI) relationship determines whether the enterprise or supplier manages these thresholds.

For items whose min-max quantity source is supplier, the supplier manages the minimum and maximum quantities on the Manage Inventory page. The supplier can manage these quantities for individual items within the search results or can be uploaded using a spreadsheet.

For items whose minimum and maximum quantity is enterprise, the enterprise sets the minimum and maximum quantities on the item or item subinventory records in Oracle Fusion applications.

> **Note:** The supplier can quickly find items with missing minimum and maximum quantities using the search criteria for requiring replenishment.

Set up Minimum and Maximum Quantities

On the Manage Inventory page, you can search for an item by entering the search parameters and set the minimum and maximum quantities for the item.

To set the minimum and maximum quantities for an item:

1. In the Supplier Portal work area, click **Manage Inventory** in the Tasks panel.
2. On the Manage Inventory page, search for an item.
3. Select the item row for which you want to update the values.
4. Enter numeric values for **Minimum Quantity** or **Maximum Quantity**.
5. Click **Save** to save your changes.

Upload Minimum and Maximum Quantities

On the Manage Inventory page, as a supplier you can upload minimum and maximum quantities using spreadsheets.

To upload minimum and maximum quantities:

1. In the Supplier Portal work area, click **Manage Inventory** in the Tasks panel.
2. On the Manage Inventory page, click **Actions** > **Upload Min-Max Quantities**.
3. On the Upload Min-Max Quantities page, click **Actions** > **Download Template**.
4. On Download Template dialog box, select **Seed Data** and click **OK**. A .csv file is downloaded with the selected predefined data.

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> **Note:** You can choose to download a blank template or pre-populate your template. You can include all records or filter the predefined data by Organization, Subinventory, Item, or Item Category

5. Open the .csv file in a spreadsheet editor.
6. Update the values in the **Minimum Quantity** and **Maximum Quantity** columns.
7. Save and close the .csv file.
8. On the Upload Min-Max Quantities page, click **Actions** > **Upload**.
9. On the File Upload dialog box, click **Choose File** to search for the .csv file that you updated.
10. Click **Submit**.

You can view the status of the uploaded file and review the error messages, if any, on the Upload Min-Max Quantities page. The uploaded file will be available for 30 days.

Related Topics
- Minimum and Maximum Inventory Thresholds

Manage Replenishment Requests

Create a Replenishment Request

To create a replenishment request:

1. In the Supplier Portal work area, click **Manage Replenishment Requests** in the Tasks panel.
2. On the Manage Replenishment Requests page, click **Actions** > **Create Replenishment Request**.
3. On the Create Replenishment Request dialog box, select the value for Item.
4. Select **Organization**
5. Select **Subinventory**, if required
6. Select **Supplier Site** (optional)

> **Note:** The supplier will only be able to select supplier sites they have access to view. If not selected, the supplier site will be defined by the enterprise purchase order process.

7. Enter **Quantity**
8. Adjust the **Delivery Date** if current date isn't preferred
9. Enter **Notes** (optional). The notes will appear as the Note to Buyer on the purchase requisition
10. Click **Submit**.

> **Note:** The replenishment requests can only be created by suppliers when inventory planning owner of the replenishment item is supplier.

Duplicate a Replenishment Request

To duplicate a replenishment request:

1. In the Supplier Portal work area, click **Manage Replenishment Requests** in the Tasks panel.
2. On the Manage Replenishment Requests page, search for the replenishment request.
3. Select the relevant row in the search results and click **Actions** > **Duplicate Replenishment Request**.

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4. On the Create Replenishment Request dialog box, adjust the quantity, delivery date, and any notes to the buyer if needed.
5. Click **Submit**.

Upload Replenishment Requests

To upload replenishment requests:

1. In the Supplier Portal work area, click **Manage Replenishment Requests** in the Tasks panel.
2. On the Manage Replenishment Requests page, click **Actions** > **Upload Replenishment Requests**.
3. On the Upload Replenishment Requests page, click **Actions** > **Download Template**.
4. On the Download Template dialog box, select **Seed Data** and click **OK**. A .csv file is downloaded with the selected predefined data.

> **Note:** You can choose to download a blank template or pre-populate your template. You can include all records or filter the predefined data by Organization, Subinventory, Ship-to Location, Item or Item Category.

5. Open the .csv file in a spreadsheet editor.
6. Update the values in the Quantity, Delivery Date and Notes columns. Notes is optional.
7. Save and close the .csv file.
8. On the Upload Replenishment Requests page, click **Actions** > **Upload**.
9. On the File Upload dialog box, click **Choose File** to search for the .csv file that you updated.
10. Click **Submit**.

On the Upload Replenishment Request page, you can view the status of the upload and review error messages, if any. The uploaded file will be available for 30 days.

Create an Advance Shipment Notice

On the Manage Replenishment Requests page, you can create one or multiple advance shipment notices (ASNs) for replenishment items with open purchase orders.

> **Note:** When selecting multiple rows, they must all be associated to the same ship-to organization.

To create an ASN for an item:

1. In the Supplier Portal work area, click **Manage Replenishment Requests** in the Tasks panel.
2. On the Manage Replenishment Requests page, search for the item.
3. Select one or multiple rows associated to the same organization you want to create ASNs for and click **Actions** > **Create ASN**.
4. The Create ASN page displays the list of purchase orders available for shipment.

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