

Oracle Fusion Cloud SCM

Implementing Supply Chain Planning

24A



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1 Overview

Overview of Supply Chain Planning Implementation

To implement Oracle Fusion Cloud Supply Chain Planning, you perform the tasks specified in the Supply Chain Planning offering. The Supply Chain Planning offering is available on the Offerings page in the Setup and Maintenance work area.

The Supply Chain Planning offering includes the following task lists:

- Define Common Applications Configuration for Supply Chain Planning
- Define Supply Chain Planning Configuration
- Define Extensions for Supply Chain Planning

The setup and implementation of Oracle Supply Chain Planning follows the implementation of these other applications to collect data from the Oracle Fusion source system:

- Oracle Fusion Cloud Product Lifecycle Management
- Oracle Supply Chain Materials Management Cloud
- Oracle Fusion Cloud Order Management
- Oracle Fusion Cloud Procurement
- Oracle Fusion Cloud Manufacturing

Note: If you plan to implement only the Supply Chain Planning offering, and you have a completely external source system from where you plan to collect data, you do not have to install other applications. Implement only the Supply Chain Planning offering, and then load data from external fulfillment systems using CSV files.

The tasks that comprise the Define Common Applications Configuration and Define Extensions task lists are documented in the Oracle Fusion Cloud SCM Implementing Common Features for SCM guide. When you set up Oracle Supply Chain Planning, you have already performed the tasks in these task lists for the other applications. You can perform additional setup for these tasks if needed. For example, if you need to set up additional users, you can do so.

The Define Supply Chain Planning Configuration task list is specific to the Supply Chain Planning offering. The setup tasks that comprise this task list are documented in the Oracle Fusion Cloud SCM Implementing Supply Chain Planning guide.

Supply Chain Planning Configuration Tasks

The Define Supply Chain Planning Configuration task list is part of the Supply Chain Planning offering.

If you have navigated to the Setup: Supply Chain Planning page from the Supply Chain Planning offering in the Setup and Maintenance work area, the Supply Chain Planning Configuration functional area corresponds to the Define Supply Chain Planning Configuration task list. The task list, or functional area, contains six tasks, two of which are required to

set up the Planning Central, Supply Planning, Demand Management, and Sales and Operations Planning work areas. This topic explains the following:

- The tasks included in the task list, or functional area, and which tasks are required.
- The work areas you can use to access the tasks.

The Tasks Included in the Task List

The following table specifies which tasks are included in the Define Supply Chain Planning Configuration task list or Supply Chain Planning Configuration functional area. The table also specifies which tasks are required.

Task	Required or Optional	Comments
Manage Trading Community Source Systems	Optional	The Oracle Fusion source system is predefined. You must create a trading community model if the source system version is External
Manage Planning Source Systems	Optional	The Oracle Fusion source system is predefined. You must add a source system if you plan to perform supply chain planning for external source systems.
Manage Planning Profile Options	Optional	You can use the predefined values for all of the profile options. To use the Order Promising work area, there is one profile option you must define: the Order Promising Sourcing Assignment Set.
Collect Planning Data	Required	Planning Central, Supply Planning, Demand Management, and Sales and Operations Planning work areas use data collected into the planing data repository. You must collect planning data to use any of these products.
Load Planning Data from Files	Optional	If you are not using the Oracle source system to collect data, you can load data from CSV files for usage by Supply Chain Planning work areas. For example, if you are using external data for Order Promising work area, you must load data from these external source systems.
Configure Planning Analytics	Required	A minimum set of steps must be completed for this task for plans to run successfully. Collect calendars from the Oracle Fusion source. Add the following to the default Dimension catalog:

Task	Required or Optional	Comments
		<ul style="list-style-type: none">• At least one calendar to the Time hierarchy.• At least one product catalog to the Product Hierarchy, if the default Planning Catalog is not collected. Default hierarchies can be used for the other dimensions.

Work Areas to Use to Access the Tasks

You can access the tasks included in the Define Supply Chain Planning Configuration task list from the following work areas:

- **Setup and Maintenance:** Use the Supply Chain Planning offering on the Setup and Maintenance work area. For more details regarding using the Setup and Maintenance work area to perform setup tasks, see the Oracle Fusion Cloud SCM Implementing Common Features for SCM guide.
- **Other Supply Chain Planning work areas (Planning Central, Supply Planning, Demand Management, and Sales and Operations Planning):** Use the Task menu to access these tasks from one of the Supply Chain Planning work areas.

2 Planning Source Systems and Profile Options

Manage Trading Community Source Systems for Data Collections

The Oracle Fusion source system is predefined in the Trading Community Model. For a new installation, the name of the predefined Oracle Fusion source system is OPS. If the installation is an upgrade, the existing name of the source system is used.

If you plan to collect data from external source systems, each source system must first be added to the Manage Trading Community Source Systems page in the Setup and Maintenance work area. Here, the external source system indicates that the source system is not connected to any other Oracle Fusion applications. For example, you may want to collect data for Oracle Global Order Promising from an external source system.

To reference a source system in a collections process, you must select the Enable for Order Orchestration and Planning check box. To open the Manage Trading Community Source Systems page, navigate to the Setup and Maintenance work area, and select the Supply Chain Planning offering. On the Setup: Supply Chain Planning page, click the Supply Chain Planning Configuration functional area. On the Supply Chain Planning Configuration page, you may have to select **All Tasks** from the **Show** drop-down list to view the Manage Trading Community Source System task.

The types of source system are explained in detail in the Managing Planning Source Systems for Data Collections: Explained topic.

Related Topics

- [Manage Planning Source Systems for Data Collections](#)

Manage Planning Source Systems for Data Collections

To populate the planning data repository, also known as the order orchestration and planning data repository, you collect data from the Oracle Fusion source system.

On the Manage Planning Source Systems page in one of the Supply Chain Planning work areas, enable organizations for collections. Depending on your security privilege, you can also enable organizations from the Setup and Maintenance work area.

Go to the Setup and Maintenance work area, then go to the task:

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

The Oracle Fusion Source System

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

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

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

External Source Systems

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

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

Version External

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

Version Others

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

- External system data for Items, Item Structures, and Catalogs is uploaded to the Product Information Management work area
- External system data for Customers, Customer Sites, Regions and Zones is uploaded to Oracle Oracle Trading Community Model
- External system data for Sales Orders is uploaded to Oracle Fusion Cloud Order Management

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

Organizations Enabled for Data Collections

The process for enabling organizations varies depending on the version of the source system.

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

1. Click the Manage Organization List button for your Oracle Fusion source system.
2. Click the Refresh Organization List button to update the organizations list.
When adding organizations to the Oracle Fusion source system to be collected into planning, you must click the **Refresh Organization List** button and then enable the organizations for collections.
3. Select the Enable for Collections check box for the organizations from which you want to collect data.

Tip: When performing collections during your initial setup, collect order orchestration reference objects from the predefined Oracle Fusion source system, and consider collecting organizations. After enabling organizations for collection, collect organizations first. You can confirm the collection results on the Supply Network Model page.

To enable organizations for data collections when the source system version is **External** (completely external source system), upload organizations using the file-based import process. The organizations are automatically enabled for collections. In the Supply Chain Planning Organizations FBDI import template (ScpOrganizationImportTemplate.xlsx), Organization tab, enter **Active** in the **Status** column for all organizations you want to import. If you leave the field blank for an organization, that organization won't show up in the Maintain Supply Network Model page in the Plan Inputs work area.

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

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

Related Topics

- [Considerations for Enabling Organizations for Data Collections](#)
- [Import Templates Used to Create CSV Files for Supply Chain Planning](#)
- [Define Flexfield Mappings](#)

Manage Planning Profile Options

For Planning Central, Supply Planning, Demand Management, and Order Promising work areas, set profile options to specify the following:

- The profile option used by Supply Chain Planning processes
- The sourcing assignment set and lead time multiplier used by the Check Availability process
- The number of minutes that the results from the Check Availability process remain valid on the Check Availability page, as well as whether the check availability page displays analytics
- The number of default display days for the Review Supply Availability page, as well as the organization calendar to be used for supply buckets in the Supply Availability report
- The category set used when assignment sets are created

Use the Manage Planning Profile Options task from one of the Supply Chain Planning work areas to open the Manage Planning Profile Options page. From this page, you can manage all of the profile options except the following:

- Order Promising Sourcing Assignment Set

- Order Promising Horizon in Days

To manage these two profile options, use the Manage Administrator Profile Values task in the Setup and Maintenance work area to open the Manage Administrator Profile Values page. On the Manage Administrator Profile Values page, search for the profile option code MSP. The search results will also include the External ATP Web Service Enabled profile option that must remain set to No in the current release.

For more information about profile options, see the Profile Options section in the Oracle Fusion Cloud SCM Implementing Common Features for SCM guide.

Supply Chain Planning Processes

This table lists the profile options that affect Supply Chain Planning processes. If the profile option doesn't have a default value, the Default Value column in the table is shown as Not applicable.

Profile Option Display Name	Default Value	Effect
Catalog for Sourcing Assignments	Not applicable	Defines the catalog to be used when defining sourcing assignment sets.
Decimal Precision for Quantity Display	3	Sets the precision to which quantities are rounded for display in planning products.
Decimal Precision for Resource Usage	6	Sets the level of decimal precision to which resource usage calculations are rounded to accurately calculate resource requirements in supply planning.
Default Bookings History Measure	Booked Item by Booked Date	Specifies the default bookings history measure to use in demand forecasting.
Default Capacity Display Calendar	Not applicable	Specifies the default calendar to use for the display of supplier capacity and resource availability in supply plans.
Default Shipments History Measure	Requested Item by Shipped Date	Specifies the default shipments history measure to use in demand forecasting.
Disable Search Warning in Planning Pages	No	Defines whether to disable the displaying of a warning when users try to run a search without including certain key criteria used to limit the amount of information returned.
Enable Data Security for Planning	No	Enables planning data security to determine access to Item, Organization, Customer, and Supplier data.
Fixed Plan Start Date	Not applicable	Specifies the fixed plan start date for planning applications, and in order promising, for selected organizations using the MM/DD/YYYY date format.

Profile Option Display Name	Default Value	Effect
Full Data Access Allowed for Entities with No Conditions Defined	Yes	Enables full data access allowed, instead of no data access allowed, for entities with no data access conditions defined.
Maximum Rows Displayed in Planning Search Pages	100000	Sets the maximum number of rows to display for searches that return large volumes of data.
Plan to Display Automatically	Not applicable	Specifies the name of the plan to be automatically displayed.
Share Plan Partitions	No	Specifies whether a customer environment is partitioned by each plan. When enabled, a single partition is created for all plans. Note: Don't set this profile option to Yes for Oracle Replenishment Planning.

Check Availability Process

This table lists the profile options that affect the Check Availability process. If the profile option doesn't have a default value, the Default Value column in the table is shown as Not applicable.

Profile Option Display Name	Default Value	Effect
Order Promising Sourcing Assignment Set	Not applicable	Defines which sourcing assignment set will be used by the supply allocation and check availability processes
Order Promising Horizon in Days	700	Sets the number of days into the future for which Oracle Global Order Promising can schedule orders. Demands with dates after the horizon cutoff aren't scheduled.
Supplier Capacity Accumulation Lead Time Multiplier	1	Defines the multiplier of the approved supplier list lead time to be used to determine the date when to begin the accumulation of supplier capacity

Check Availability Page

This table lists the profile options that affect the Check Availability page.

Profile Option Display Name	Default Value	Effect
Timeout for Check Availability Results	10	Sets the number of minutes that the results returned by the Check Availability process will remain valid on the Check Availability page
Analytics for Check Availability Page Enabled	Yes	If enabled, the Check Availability page will display analytics
Fulfillment Line Distribution Analytic Days for First Date Range	2	Sets the number of days for the first lateness range in the Fulfillment Line Distribution analytic
Fulfillment Line Distribution Analytic Days for Second Date Range	7	Sets the number of days for the second lateness range in the Fulfillment Line Distribution Analytic
Fulfillment Line Distribution Analytic Days for Third Date Range	14	Sets the number of days for the third lateness range in the Fulfillment Line Distribution Analytic

Review Supply Availability Page and Supply Availability Report

This table lists the profile options that affect the Review Supply Availability page and the Supply Availability report. If the profile option doesn't have a default value, the Default Value column in the table is shown as Not applicable.

Profile Option Display Name	Default Value	Effect
Default Display Days in Review Supply Availability Page	21	Sets the number of horizon days for the Review Supply Availability page if end date wasn't entered on the Check Availability page
Organization Calendar for Supply Buckets in Supply Availability Report	Not applicable	Defines the organization calendar to use for the weekly and period supply buckets in the Supply Availability report

Assignment Set and Assignment Level

Each assignment level includes categories that you can select when you create an assignment set, depending on how you set the Sourcing Rule Category Set profile. This profile option doesn't come predefined with a default value, so you must specify a value for it.

Use Database Promising or Source Promising

For details, see [Database Promising](#) and [Source Promising](#).

Enable Splits for Data Store XML Files Larger than 2GB

Set up the order promising site profile so that the Refresh and Start Order Promising Server process can generate multiple data store XML files when the file size is over 2GB.

1. Navigate to the **Setup and Maintenance** work area.
2. In the task pane, click **Search**.
3. Search for the **Manage Profile Options** task.
4. Open the **Manage Profile Options** page.
5. In the **Search Results: Profile Options** section, create a new profile option.
 - a. For the profile option code, enter this value: **MSP_GOP_GEN_MULTI_DS_FILES**.
 - b. For the profile display name, enter this value: **MSP_GOP_GEN_MULTI_DS_FILES**.
 - c. From the application menu, select **Global Order Promising**.
 - d. From the module menu, search for and select **Order Promising**.
 - e. In the SQL Validation field, enter this value: `select meaning PROFILE_DISPLAY_VALUE, lookup_code PROFILE_CODE_VALUE from fnd_lookups where lookup_type = 'MSC_YES_NO'`
 - f. Specify a start date that's no later than the current day's date.
6. In the **Profile Option Levels** section, at the **Site** level, set the profile value as enabled and updatable.
7. Click **Save and Close**.
8. Search for and open the **Manage Administrator Profile Values** task.
9. Search for the **MSP_GOP_GEN_MULTI_DS_FILES** profile.
10. In the **Profile Option: Profile Values** section, at the **Site** level, enter the profile value **Yes**.
11. Click **Save and Close**.

This setting will take effect from your next run of the Refresh and Start Order Promising Server scheduled process, and supports following data store files:

- InventoryPolicy
- ResourceAllocation
- ShippedDemandHistory
- Supplier
- Geography
- GeographyHierarchy
- Customer
- BeginningInventory
- PurchaseOrder
- PlannedPurchaseOrder
- FulfillmentLine
- TransferOrder
- PlannedTransferOrder
- WorkOrder
- PlannedWorkOrder
- Reservation
- LaneTransportModelItem

- MfgOperationItem
- MfgOperationResource
- ManufacturingRouting
- Resource

This setting isn't applicable for the following files:

- Calendar
- AllocationRule
- Location
- UOM
- OpdatastoreConfig
- CarrierCalendar
- UserDemand
- Lane
- SourcingRule
- ServiceObjective
- LocationManufacturing
- MfgOperationOutput

CAUTION: Disable the now-defunct **MSP_GOP_SUPPORT_UPTO_4GB** profile option to avoid any profile behavior conflicts.

Related Topics

- [Overview of Profile Options](#)
- [Hierarchy in Profile Levels](#)

Considerations for Enabling Organizations for Data Collections

From the list of organizations for each source systems, you designate which organizations will have their data collected when a collections process collects data from the source system.

Deciding Which Organizations to Enable for Collections

To determine which organizations to enable for collections, analyze the sourcing strategies for your company, the type of organization for each organization in the list, and any other business requirements that would determine whether system resources should be expended to collect data from that organization. If the data from that organization would never be used by order promising or order orchestration, no need to collect the data.

For example, consider a scenario where the list of organizations for a source system includes 20 manufacturing plants and 10 distribution centers. Because the business requirements specify that the movements of materials from the manufacturing plants to the distribution centers are to be controlled separately from order orchestration and order promising, there are no sourcing rules that include transferring from one of the manufacturing plants. For this scenario, you would only enable the 10 distribution centers for collections.

Define Flexfield Mappings

If your source systems include usage of flexfields to capture additional attributes, you can map the flexfields from the source system to the destination system. Use the Manage Planning Source Systems task to map the descriptive flexfields.

Oracle Fusion source systems support the descriptive flexfield segment values from multiple source systems. This capability enables you to combine flexfield attributes on the same entity from multiple sources.

Perform the following procedure to define the flexfield mappings:

1. In the Setup and Maintenance work area, select the **Supply Chain Planning** offering.
2. On the Setup: Supply Chain Planning page, click the **Supply Chain Planning Configuration** functional area.
3. In the Supply Chain Planning Configuration list of all tasks, click the **Manage Planning Source Systems** task.
4. On the Manage Planning Source Systems page, select your destination system.
5. In the Source Systems section, select a source system, click **Actions**, and then click **Define Flexfield Mapping**.
6. In the Define Flexfield Mapping dialog box, map the source entities for the available source and destination flexfields.
7. Click **Save and Close**.

Related Topics

- [Overview of Flexfields](#)

3 Planning Data Collections

Overview of Data Collections for Supply Chain Planning

Before running plans from one of the Oracle Fusion Cloud Supply Chain Planning work areas, you must collect data into the planning data repository. Order promising and order management processes also use the planning data repository to promise and manage orders.

To collect data into the planning data repository from one of the Supply Chain Planning work areas, you can do one of the following:

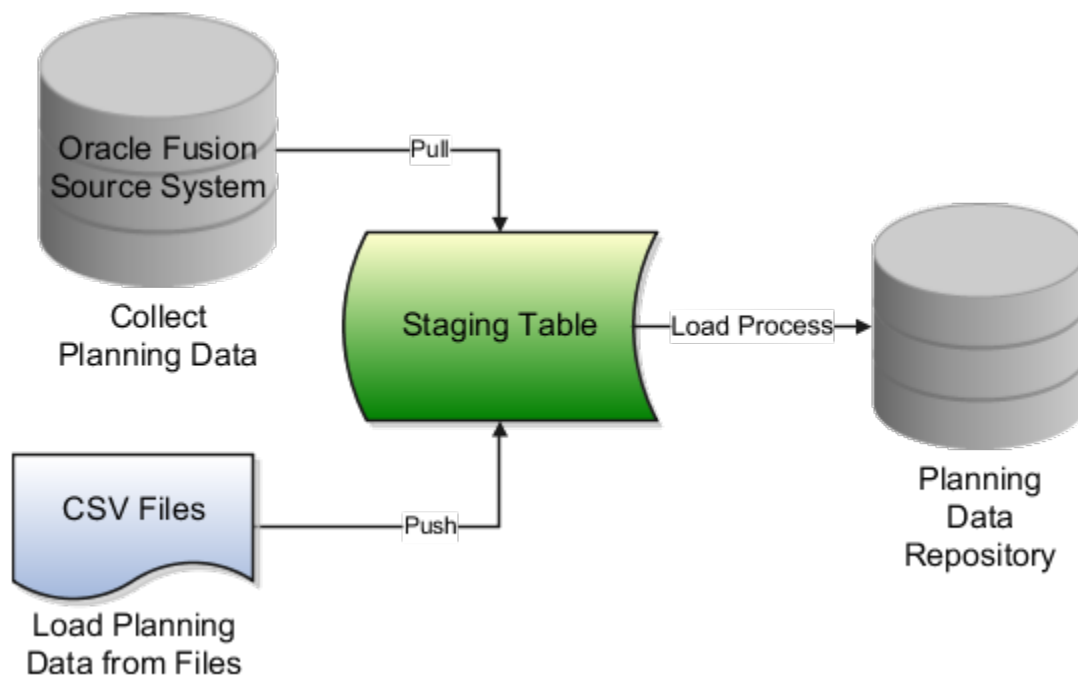
- **Collect Planning Data:** Use this page when you collect data from the source system for Fusion Applications.
- **Load Planning Data from Flat Files:** Use this scheduled process when you collect data from a completely external source system.

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

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

In the collections process flow, when you begin data collections from the Fusion Applications source system, the staging table pulls data from the source system. Similarly, when you begin data collections from comma-separated values (CSV) files, the data is pushed from files to the staging table. Then, the data from the staging table is loaded into the planning repository with the use of scheduled processes.

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



Collect Planning Data

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

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

- Reference Data
- Demand Planning Data
- Supply Planning Data

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

Note: You must have the Run Plan with Snapshot privilege to collect the item relationships preference data.

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

Note: If you're collecting information at the Customer Site level for a demand plan that uses a planning level profile, you must run the **Aggregate Collected Planning Data** scheduled process after data collection is over. Then, you must run the **Create Trees for Dimensions** scheduled process in the net change mode for the Customer dimension.

Load Planning Data from Flat Files

When you submit the **Load Planning Data from Flat Files** scheduled process, data from the CSV files is first pushed into the staging tables. The process then loads the data from the staging tables into the planning data repository.

To load the planning data using CSV files, follow this high-level process:

1. Create the CSV files. To create the CSV files, you can use a predefined set of file-based data import (FBDI) templates.
2. Import the CSV files. From the Navigator, click **File Import and Export**, and create a new import. Specify scm/planningDataLoader/Import for the account.
3. Submit the **Load Planning Data from Flat Files** scheduled process.

Note: If you're collecting information at the Customer Site level or deleting customer-related information using the **Load Planning Data from Flat Files** scheduled process for a demand plan that uses a planning level profile, you must run the **Aggregate Collected Planning Data** scheduled process after data collection is over. Then, you must run the **Create Trees for Dimensions** scheduled process in the net change mode for the Customer dimension.

Related Topics

- [How do I update existing setup data?](#)
- [Load Planning Data from Flat Files](#)
- [Overview of Planning Level Profiles](#)

Global Entities

Within data collections, certain business entities in Oracle Fusion Cloud Supply Chain Planning are referred to as global entities.

Global entities are specific for each instance and are common for all source systems. They're common without regard to whether they're collected from the Oracle Fusion source system or from an external source system with the use of the file-based data import (FBDI) templates.

When data is collected for a global entity, the planning data repository stores only one record for each instance of the global entity. The data collections process removes the source system reference from the global entity and stores the data in the data repository. If the data collections process collects the same instance of a global entity from more than one source system, the data repository stores the value from the last collection.

The following example describes the collection of the global entity called unit of measure (UOM) from three source systems, namely A, B, and C:

- A has an instance of a UOM. During the collection of UOMs from A, the kilogram UOM is collected. This is the first time the kilogram UOM is collected. The data collections process creates a kilogram record in the data repository.
- B doesn't have any instances of a UOM. During the collection of UOMs from B, the data collections process doesn't collect the kilogram value. Because there was no record for the kilogram UOM in B, the data collections process doesn't change the kilogram record in the data repository. The record of the kilogram value from A is still valid.
- C has an instance of a UOM. During the collection of UOMs from C, the kilogram UOM is again collected. The data collections process registers the kilogram record in the data repository to match the value from C.

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

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

- Approved Supplier List
- Currencies and Currency Conversion Class
- Customer and Customer Site
- Demand Class
- Order Orchestration Reference Objects
- Planners
- Regions and Zones

Note: When you set up your geographies in the Oracle Trading Community Architecture or regions using the Supply Chain Planning Regions import template (ScpRegionsImportTemplate.xmlsm), ensure that the names used for the first- and second-level regions are different. If the names are the same, collections won't happen for the second-level region and child regions.

- Shipping Methods (Carrier, Mode of Transport, Service Level)

- Supplier Capacity
- Suppliers and Supplier Sites
- Units of Measure and UOM Conversions

Data Collection Types for Supply Chain Planning

When you collect planning data, one of the parameters you specify for the Collect Planning Data task is the Collection Type parameter.

You can select this task from any of your Supply Chain Planning work areas. For the Collection Type parameter, you can select one of the following values:

- *Targeted*: Choose the Targeted collection type when you want to collect a significant volume of source system data. Typically, you use the Targeted collection type in scenarios such as bulk upload of transaction data, instance upgrade, and change in collection filters.
- *Net change*: Choose the Net change collection type when you want to collect changed data and new records since the last successful collection cycle.
- *Automatic selection*: Choose the Automatic collection type when you want the planning process to decide and automatically select an appropriate collection type for each of the entities.

Targeted

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

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

Net change

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

Automatic selection

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

Manage Planning Source Systems for Data Collections

To populate the planning data repository, also known as the order orchestration and planning data repository, you collect data from the Oracle Fusion source system.

On the Manage Planning Source Systems page in one of the Supply Chain Planning work areas, enable organizations for collections. Depending on your security privilege, you can also enable organizations from the Setup and Maintenance work area.

Go to the Setup and Maintenance work area, then go to the task:

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

The Oracle Fusion Source System

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

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

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

External Source Systems

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

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

Version External

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

Version Others

The version Others source system indicates that the source system is connected to other Oracle Fusion Applications Suite. This source system is integrated for the Product Information Management work area, Oracle Trading Community

Model, and Oracle Fusion Cloud Order Management. The following conditions are applicable when the external source is Others.

- External system data for Items, Item Structures, and Catalogs is uploaded to the Product Information Management work area
- External system data for Customers, Customer Sites, Regions and Zones is uploaded to Oracle Oracle Trading Community Model
- External system data for Sales Orders is uploaded to Oracle Fusion Cloud Order Management

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

Organizations Enabled for Data Collections

The process for enabling organizations varies depending on the version of the source system.

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

1. Click the Manage Organization List button for your Oracle Fusion source system.
2. Click the Refresh Organization List button to update the organizations list.

When adding organizations to the Oracle Fusion source system to be collected into planning, you must click the **Refresh Organization List** button and then enable the organizations for collections.

3. Select the Enable for Collections check box for the organizations from which you want to collect data.

Tip: When performing collections during your initial setup, collect order orchestration reference objects from the predefined Oracle Fusion source system, and consider collecting organizations. After enabling organizations for collection, collect organizations first. You can confirm the collection results on the Supply Network Model page.

To enable organizations for data collections when the source system version is **External** (completely external source system), upload organizations using the file-based import process. The organizations are automatically enabled for collections. In the Supply Chain Planning Organizations FBDI import template (ScpOrganizationImportTemplate.xlsx), Organization tab, enter **Active** in the **Status** column for all organizations you want to import. If you leave the field blank for an organization, that organization won't show up in the Maintain Supply Network Model page in the Plan Inputs work area.

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

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

Related Topics

- [Considerations for Enabling Organizations for Data Collections](#)
- [Import Templates Used to Create CSV Files for Supply Chain Planning](#)
- [Define Flexfield Mappings](#)

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

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

Data Collections

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

Order Orchestration

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

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

Order Promising

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

Related Topics

- [Collect Data for Global Order Promising](#)

How You Enable Cross-References of Entities by Data Collections

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

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

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

How Planning Processes Collect Different Work Definitions and Item Structures

You may be concerned that the work definition and item structure data in your supply chain planning work area does not match with what was defined in Oracle Manufacturing.

You may be concerned that the work definition and item structure data in your supply chain planning work area does not match with what was defined in Oracle Fusion Cloud Manufacturing.

You don't need to worry. The planning application collects and uses data based on how the work definitions and item structures are defined and associated in the manufacturing source system.

Work Definitions and Item Structures in the Source System

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

Work Definitions and Item Structures in the Planning Data Repository

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

Oracle Manufacturing Definition	Item Structure Name and Work Definition Name in the Planning Data Repository	Planning Collections Processes
Only item structure is defined for an item. No work definition is defined.	Item structure name exists, no work definition name	<p>The planning process collects the item structure information but does not collect information for routing, operations, or item resources.</p> <p>The planning process uses item structure to plan components and does not plan resources.</p>
Only work definition is defined for an item. No item structure is defined.	Work definition name exists, no item structure name	<p>The planning process collects the work definition information to populate the item structure and routing information.</p> <p>The planning process populates the component information and operation sequence number in the item structure based on the ad hoc components and operation assignment available in the work definition.</p> <p>The planning process uses the work definition information to plan both components and resources.</p>
Both item structure and work definition are defined for the item.	Both work definition name and item structure name exist	<p>The planning process uses the components that are associated with the work definition to plan. The planning process does not consider any components of item structure that are not associated with the work definition. You can override the item structure component usage within the work definition.</p> <p>The planning process collects component attributes (such as component effectivity) from the item structure if the components are associated with the work definition.</p> <p>The planning process uses the work definition to plan resources.</p>
Both item structure and work definition are defined for the item, but the work definition does not refer to the item structure. Ad hoc components are assigned to the work definition operations.	Work definition name exists, no item structure name	<p>The planning process collects the components from the work definition and not from the item structure in the Oracle Fusion Product Information Management solution.</p> <p>The process plans components based on work definition operation assignments and plans resources based on the work definition.</p>

Enable External Data Collection for the Oracle Fusion Source System

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

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

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

This table lists the entities for each functional area.

Functional Area	Entities
Inventory and Materials Management	On-hand Quantity and Transfer Orders
Procurement	Purchase Orders and Requisitions
Order Management	Sales Orders and Reservations
Manufacturing	Work Order Supplies, Resource Availability, Resources, Work Definitions, and Item Structures

Enable External Data Collection

Use these steps to enable external data collection:

1. Select the **Manage Planning Source Systems** task in the Tasks panel from any Supply Planning work area page. Or use this task in the Setup and Maintenance work area:
 - Offering: Supply Chain Planning
 - Functional Area: Supply Chain Planning Configuration
 - Task: Manage Planning Source Systems
2. In the list of source systems, select the row that has Oracle Fusion in the **Version** column.
3. In the Actions menu, click **Select Data Sources**.
4. Select the **Enable External Data** check box, and then select the functional areas that you want to source transactional entities for.

Note: Every time you enable or disable external data collection, you must run a targeted data collection to ensure complete refresh of data in the data repository. Only the data for the organizations included in the FBDI template is refreshed.

Related Topics

- [How You Load Planning Data from Files](#)

Collection of Safety Stock Levels

This topic explains how you collect safety stock levels for modules of Oracle Fusion Cloud Supply Chain Planning.

Note these points about collecting safety stock levels:

- You must use the file-based data import (FBDI) template named Supply Chain Planning Safety Stock Levels (ScpSafetyStockLevelImportTemplate.xlsx) to import externally calculated safety stock levels.

You can't use the Collect Planning Data page to collect safety stock levels from an Oracle Fusion source system.

- You can import safety stock levels at only the organization level.

You can't import safety stock levels at the subinventory level.

- You can import only time-phased safety stock quantities using the import template. You can't use the null value for the **Effective Date** column.

For Oracle Replenishment Planning, only one value is accepted for a combination of an item and an organization. If you upload time-phased safety stock quantities, the quantity for which the effective date is on or before the plan start date and that's closest to the plan start date is used. For information about externally calculated safety stock quantities for replenishment plans, see the topic titled [How You Upload Externally Calculated Safety Stock](#).

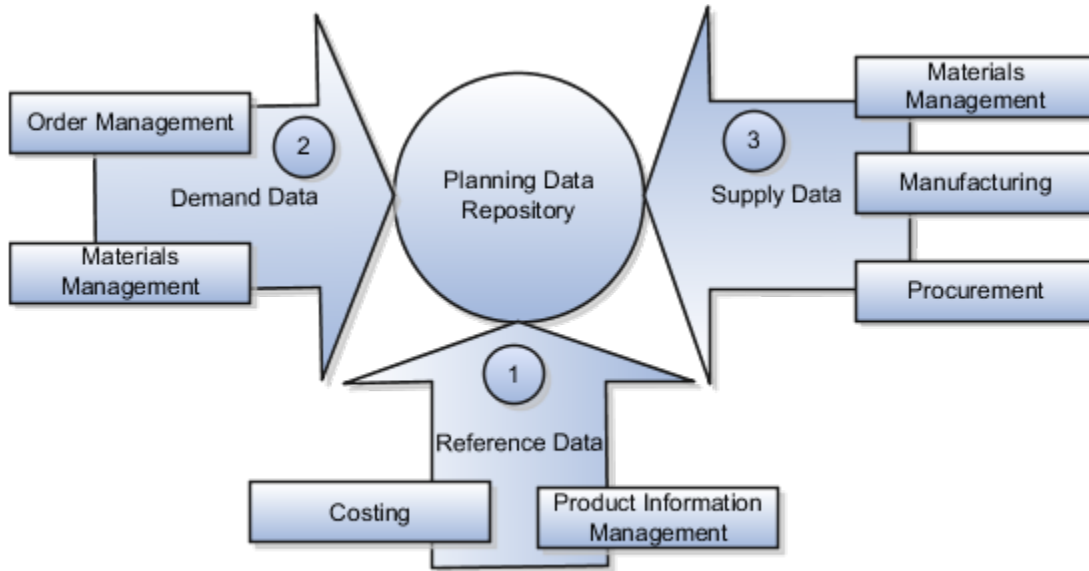
Collect Planning Data from the Oracle Fusion Source System

How You Collect Different Data Types for Supply Chain Planning

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

The collected data are stored in the planning data repository.

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



Explanation of Callouts

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

Reference Data

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

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

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

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

Demand Data

You collect demand data from two potential sources:

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

Supply Data

You collect supply data from three sources:

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

Related Topics

- [How You Load Planning Data from Files](#)
- [Run the Load Planning Data from Files Process](#)
- [Import Templates Used to Create CSV Files for Supply Chain Planning](#)

Collection Filters and Collection Templates

You use collection filters and collection templates when you need to collect some common set of entities repeatedly.

The collection filters and collection templates are located on the Collect Planning Data page. To open the Collect Planning Data page, click the Collect Planning Data task from one of the Supply Chain Planning work areas.

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

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

Collection Filters

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

Enabling Collection Filters

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

Collection Templates

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

When you select a predefined template from the list, the Collection Type field is defaulted to **Automatic selection** and you cannot edit the field. Also, when you select a predefined template, the Select Collection Filters field is disabled.

You can create a collection template on the Collect Planning Data page by selecting the data collection entities and saving the template for future use. For example, if you frequently collect certain supply planning transactional entities, such as On Hand, Purchase Orders, and Purchase Requisitions, then save these entities as a collection template. It reduces the overhead of selecting the same entities for subsequent collection cycles.

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

Collect Data Using the Targeted Collection Type

To perform a complete refresh of the data repository used by the Supply Chain Planning products, run a targeted collection.

You can run the targeted collection immediately or you can schedule the process to run later. Demand planning data can only be collected by using the Targeted collection type.

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

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

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

2. On the Collect Planning Data page, complete the following steps.

o On the Parameters tab:

- i. Select your source system.
- ii. For the collection type, select Targeted.

Demand planning data can only be collected by using the Targeted collection type.

- iii. Click **Select Collection Filters** to select the collection filters.
- o On the Reference Data subtab, move the required reference entities to the Selected Entities area.
- o On the Demand Planning Data subtab, set options to collect the historical demand data in the planning data repository. The planning process uses the historical demand data for statistical forecasting.

- **Collection Time Frame Options:** You can specify a fixed or rolling date range for which to collect data.

The **Fixed Date Range** option enables you to collect history data within a fixed date range that you specify.

The **Rolling Date Range** option enables you to collect the history data for the number of days that you specify. For example, if you forecast weekly, specify **7** in the **Number of Days to Collect** field to collect the demand history data once per week. The data collections collect the demand history data for the latest week.

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

- **History Measures and Attributes:** Select your shipments history and bookings history measures.
- **Collection for ETO Items:** Select **Collect history from associated base models** to collect bookings and shipments history for Engineer to Order (ETO) items from the associated base models. When you don't select this option, the history is collected from the standard ETO items.
- **History Data Options:** To collect only specific order types, select from the **Order Types to Include** list of values. By default, all order types are included.

Select **Organization - Consumption Inventory Transactions to Include** to collect consumption inventory transactions at the organization level. You can collect only the transfer orders inventory transactions or all consumption inventory transactions.

Select **Subinventory - Consumption Inventory Transactions to Include** to collect consumption inventory transactions at the subinventory level. You can collect only the transfer orders inventory transactions or all consumption inventory transactions for the organizations that you enabled for subinventory planning.

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

- **Additional Options:** Select additional options for collections.

Collect Price Lists: Collect the price lists specified in the collections filter for price lists, or collect all price lists if no filter is specified.

Collect Configure to Order Data: If you selected history measures and attributes, then select the relevant check boxes to collect shipment history options and booking history options.

Sales Organization Hierarchy: Select **Enable sales organization hierarchy collection** to collect one or more sales hierarchies.

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

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

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

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

- iii. You can collect the existing data for the resource availability.
 - iv. You can also regenerate the resource availability data and then collect the data. If you select the **Regenerate data, and then collect** option, the collections process runs the **Update Resource Availability Job** scheduled process first and then collects the resource availability data.
3. (Optional) Click the Schedule tab and set collections to run as soon as possible or schedule to run at a different time.
 4. Click **Submit** to start the collections process.
 5. Monitor the collection status using the Scheduled Processes page.
 6. Review the collected data in the Plan Inputs work area.

Related Topics

- [Verify the Load Planning Data from Files Process](#)
- [Review Data in the Planning Data Repository](#)
- [Set Up Forecast Consumption for Transfer Orders](#)

Collect Data Using the Net Change Collection Type

You can collect data from the Oracle Fusion source system by running the net change collection or by scheduling to run the process later.

Before running a Net Change collection, you must run a Targeted collection for the selected entities. After the first Targeted collection, you can run Net Change collections.

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

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

Related Topics

- [Verify the Load Planning Data from Files Process](#)
- [Review Data in the Planning Data Repository](#)
- [How do I update existing setup data?](#)

Enable Organization Group Collection for the Net Change Collection Type

You can use organization groups to limit the net change data collection from a source system to specific organizations.

Using organization groups for collection also eliminates the chances of data overlap when multiple instances of net change collections are run at a time. Planners can run collections for their organizations without waiting for each other.

Let's take a simple example where your organization considers only the D1 and D2 distribution centers in your source system for shipments to your customers. In such a case, you can create an organization group, assign D1 and D2 to the organization group, and collect net change data specifically for this group.

Note: Before you begin, ensure that you have your organization groups created. A supply planner creates and manages organization groups using the Manage Organization Groups button on the Maintain Supply Network Model page.

Do these to collect net change data for an organization group.

1. Access the Collect Planning Data page or Load Planning Data from Files page from a Supply Planning work area.
2. Select the source system. Organization groups are managed within the source systems.
3. Select the Net Change collection type. You can select an organization group for data collection only when the collection type is Net Change.
4. Enable the organization group collection, and then select an organization group.
5. Perform the net change data collection. Refer to the *Collect Data Using Net Change Collection Type* topic in this chapter for instructions.

Note: After selecting your organization group and other data collection entities, you can also save your selections as a template. Refer to the *Collection Filters and Collection Templates* topic in this chapter for additional information.

Related Topics

- [Collect Data Using the Net Change Collection Type](#)
- [Collection Filters and Collection Templates](#)
- [How You Maintain Your Supply Network Model](#)

Manage Incremental Planning Collections Artifacts Scheduled Process

Use the Manage Incremental Planning Collections Artifacts scheduled process to create, maintain, drop, or truncate net-change planning collection log tables.

Log tables store information about modifications to supported entities within net-change or incremental collections. These modifications include actions such as deletion, updating, or creation of entities or their attributes. For example, the details could reflect alterations to the date or quantity of a purchase order schedule.

The Manage Incremental Planning Collections Artifacts scheduled process is run to manage log tables in these modules:

- Oracle Supply Planning
- Oracle Demand and Supply Planning
- Oracle Sales and Operations Planning
- Oracle Demand Management
- Oracle Replenishment Planning
- Oracle Global Order Promising
- Oracle Backlog Management

For more information on this scheduled process, see the topic titled *Manage Incremental Planning Collections Artifacts*.

Load Planning Data from Others and External Source Systems

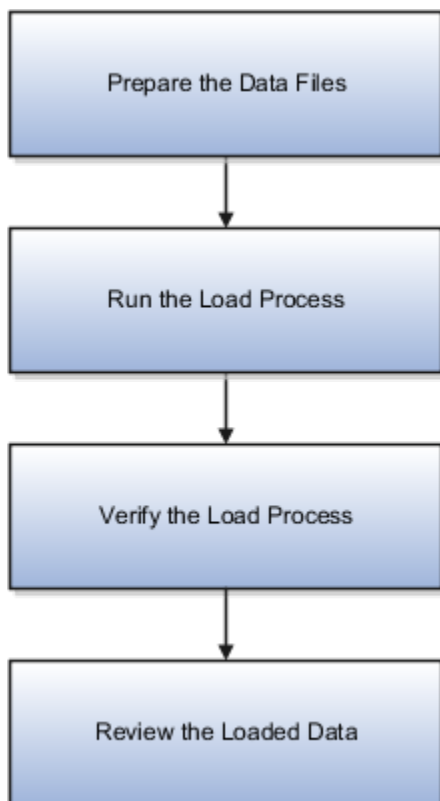
How You Load Planning Data from Files

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

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

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

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



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

1. Create CSV files using Microsoft Excel template and compress them into zip files.
 - a. Save the CSV file using the suggested entity name. You can add an underscore and other additional characters to the CSV file name. However, you can provide any name to the zipped file.

For example, you can name the CSV file ShipmentHistory_abc.csv and the zip file LoadingCSV.zip.

2. Run the process to load planning data from files
3. Verify the load planning data process
4. Review the loaded data

Related Topics

- [Create CSV Files to Load Planning Data](#)
- [Import Templates Used to Create CSV Files for Supply Chain Planning](#)
- [Run the Load Planning Data from Files Process](#)
- [Verify the Load Planning Data from Files Process](#)
- [Review Data in the Planning Data Repository](#)

Create CSV Files to Load Planning Data

To perform the Load Planning Data from Files task in one of the Supply Chain Planning work areas or Setup and Maintenance work area, you must prepare the data you want to load.

You must create the necessary CSV files used to create files for import. This procedure explains how to create CSV files to prepare planning data for loading.

1. Locate the applicable file import templates (XLSM files) in the following guide: File-Based Data Import (FBDI) for SCM. Extract the templates to a local space.

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

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

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

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

3. After you finish preparing the data in the worksheet, generate the CSV file. The Generate CSV File button is located in the Instructions and CSV Generation worksheet of the workbook.
4. When you save the generated CSV file, you must use the suggested name of the entity. You can add underscore and add additional characters to the file name. For example, you can name the CSV file as ShipmentHistory_abc.csv and you can name the file as LoadingCSV.zip.

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

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

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

Related Topics

- [How You Load Planning Data from Files](#)
- [Run the Load Planning Data from Files Process](#)

Data Collection Sequence

This topic explores the sequence that you should follow for data collection.

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

If you run targeted collections for all entities, you can ignore the sequence for collections because targeted collections automate the collection sequence for all entities within a single collections request. If you collect many entities in a single request, collections will process them according to the sequences shown in this topic. If you collect only a few entities, then you must be aware of the collections sequence information. For example, you should not collect work orders before you collect items or resources.

To make the workflow simple, the collection sequence is divided into two parts - Part A and Part B. The collection entities in Part B are dependent on the collection entities in Part A. You must collect the entities in Part A before you collect the entities in Part B. Also, the collection entities are grouped together for easier presentation. The data groups in Part A are:

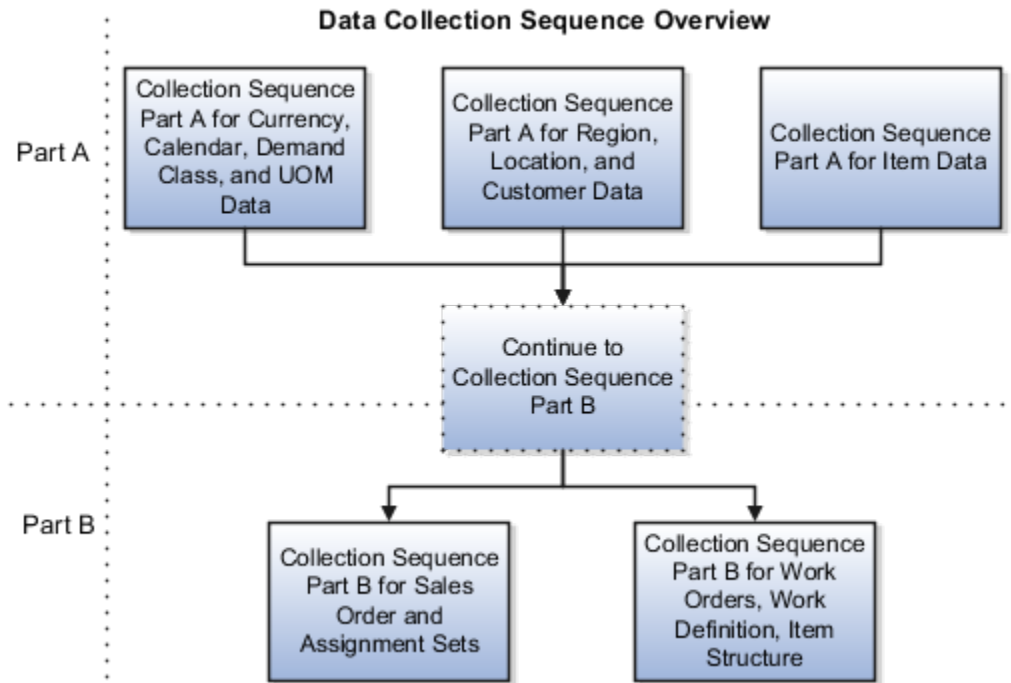
- Collections Sequence Part A for Item Data
- Collections Sequence Part A for Region, Location, and Customer Data
- Collections Sequence Part A for Currency, Calendar, Demand Class, and UOM Data

The data groups in Part B are:

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

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

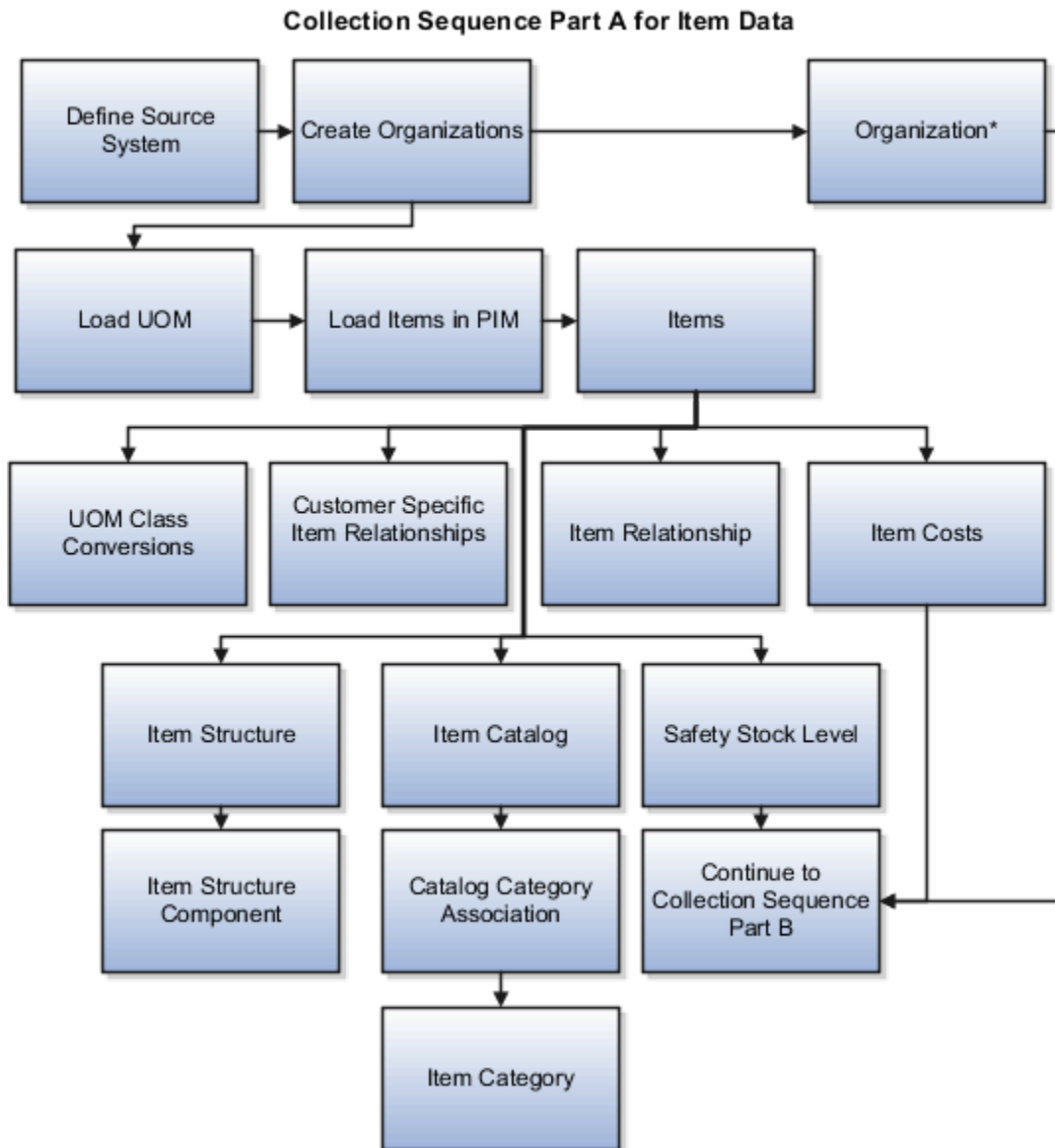
The following figure provides an overview of the data collection sequence. The overview shows how Part A and Part B fit together to form a complete data collection flow.



Collections Sequence Part A for Item Data

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

Note: The Organization entity is marked with an asterisk because you can collect other entities such as Planner, Item Cost, Subinventory, Carrier, Calendar Assignment, Supplier, and Supplier Site after collecting Organization. For more information on the collection sequence for these entities, see the Collections Sequence Part A for Currency, Calendar, Demand Class, and UOM Data figure. Refer to the entities that are collected after Organization. Also, ensure that you collect Location before collecting Supplier Site.



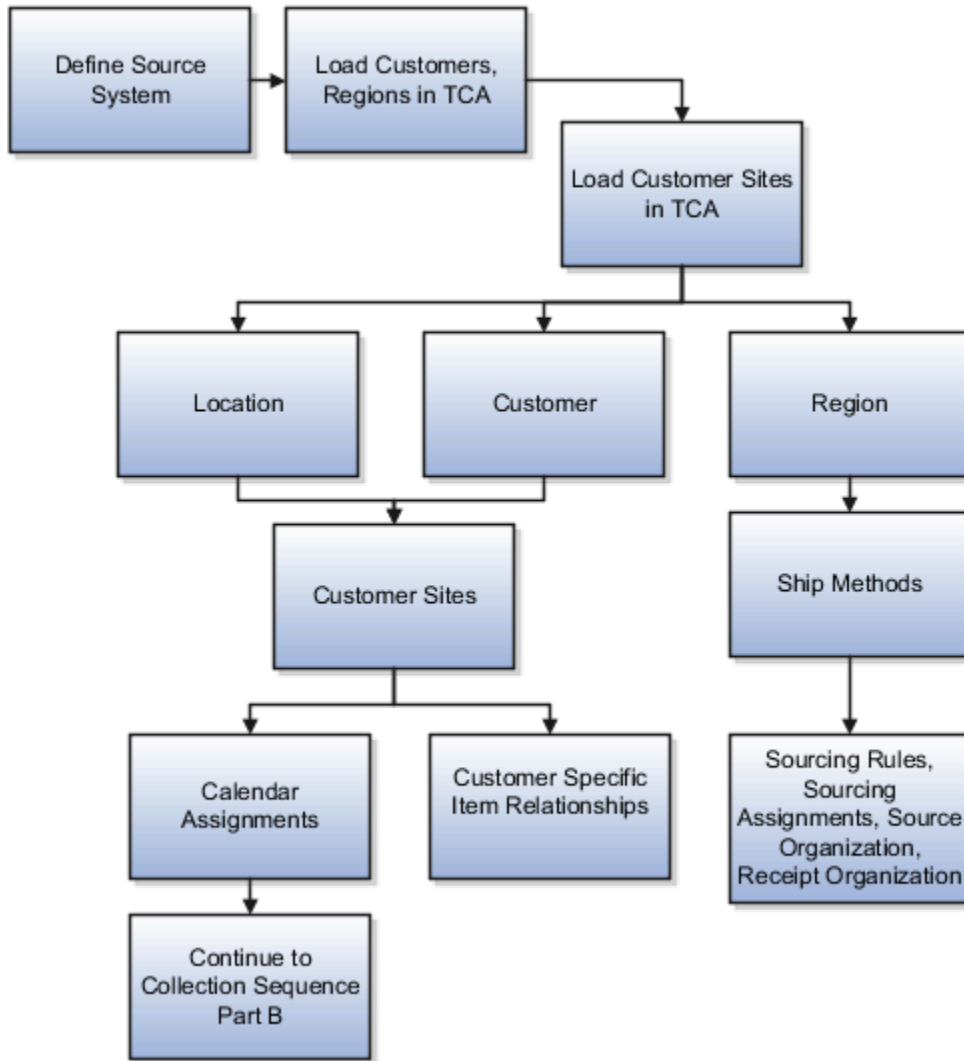
When you collect the data described here, continue to the collection sequence Part B described in the following subsections.

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

Collections Sequence Part A for Region, Location, and Customer Data

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

Collection Sequence Part A for Region, Location, and Customers Data



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

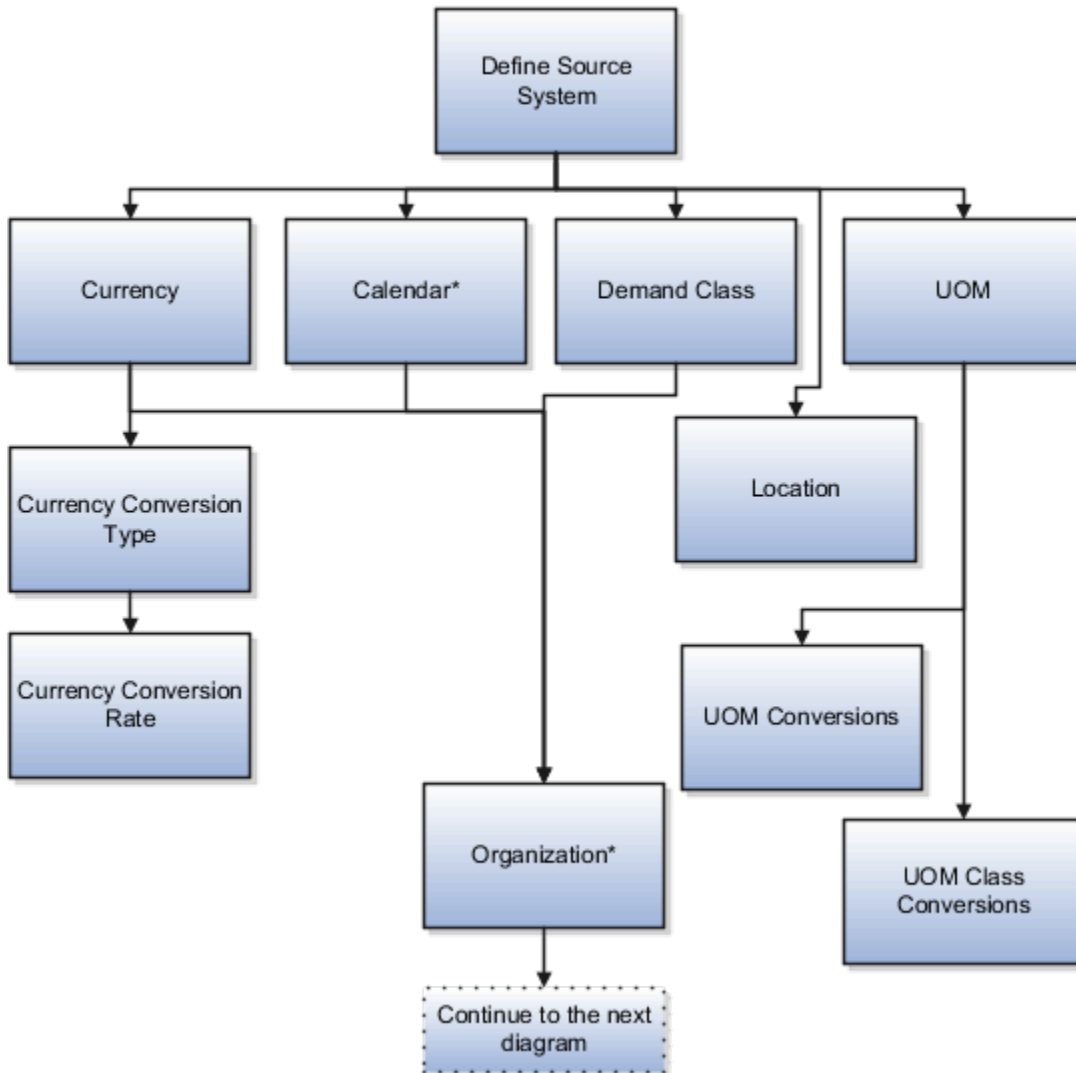
- Collection Sequence Part B for Sales and Order and Assignment Sets
- Collection Sequence Part B for Work Orders, Work Definition, and Item Structure

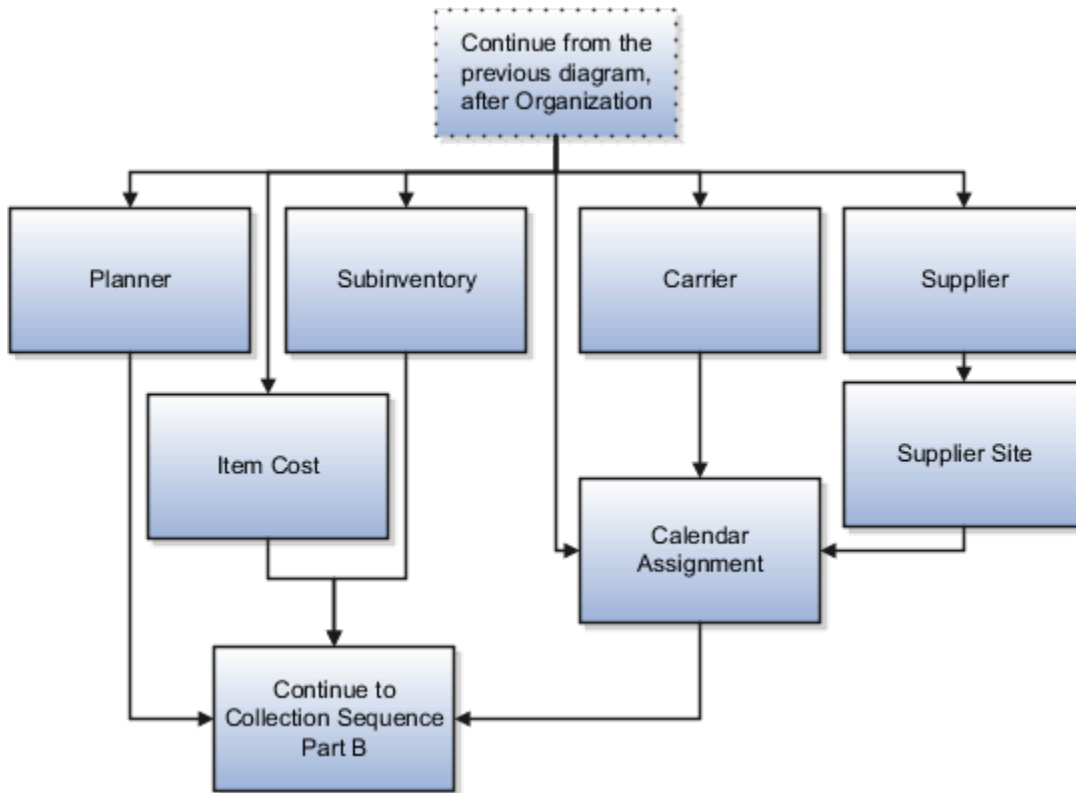
Collections Sequence Part A for Currency, Calendar, Demand Class, and UOM Data

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

Note: The Calendar entity is marked with an asterisk because there are other entities that are associated with Calendar that you must collect in a sequence. To collect other entities associated with Calendar, see the Calendar Upload Sequence figure.

Collection Sequence Part A for Currency, Calendar, Demand Class and UOM Data





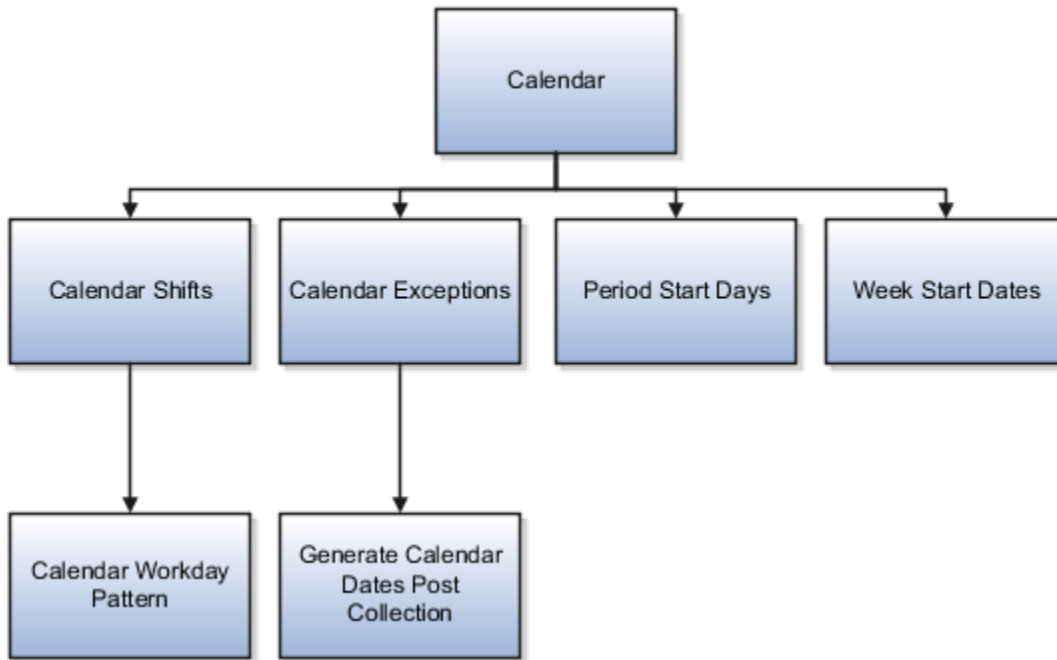
When you collect the data described here, continue to the collection sequence Part B described in the following subsections.

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

Collection Sequence for Calendar Data

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

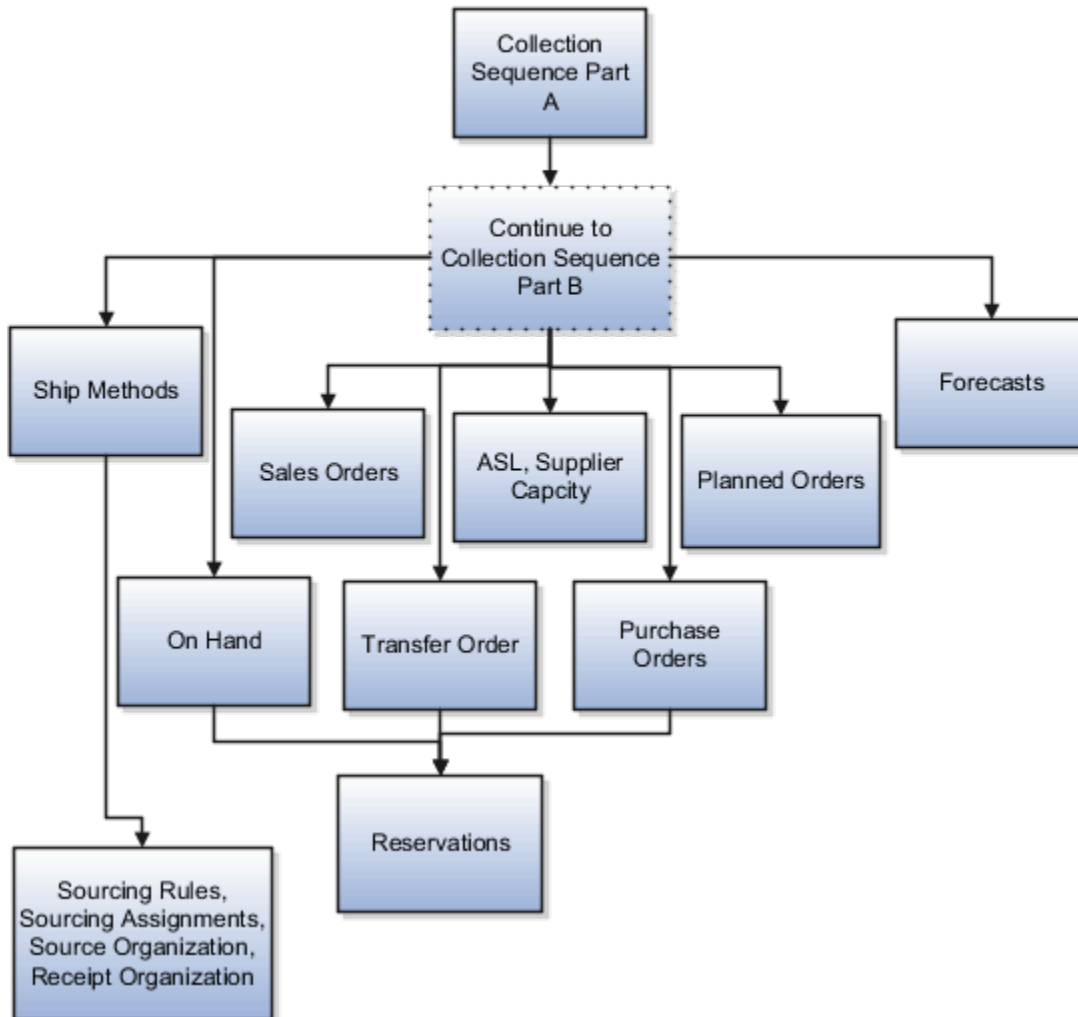
Calendar Upload Sequence



Collections Sequence Part B for Sales Order and Assignment Sets

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

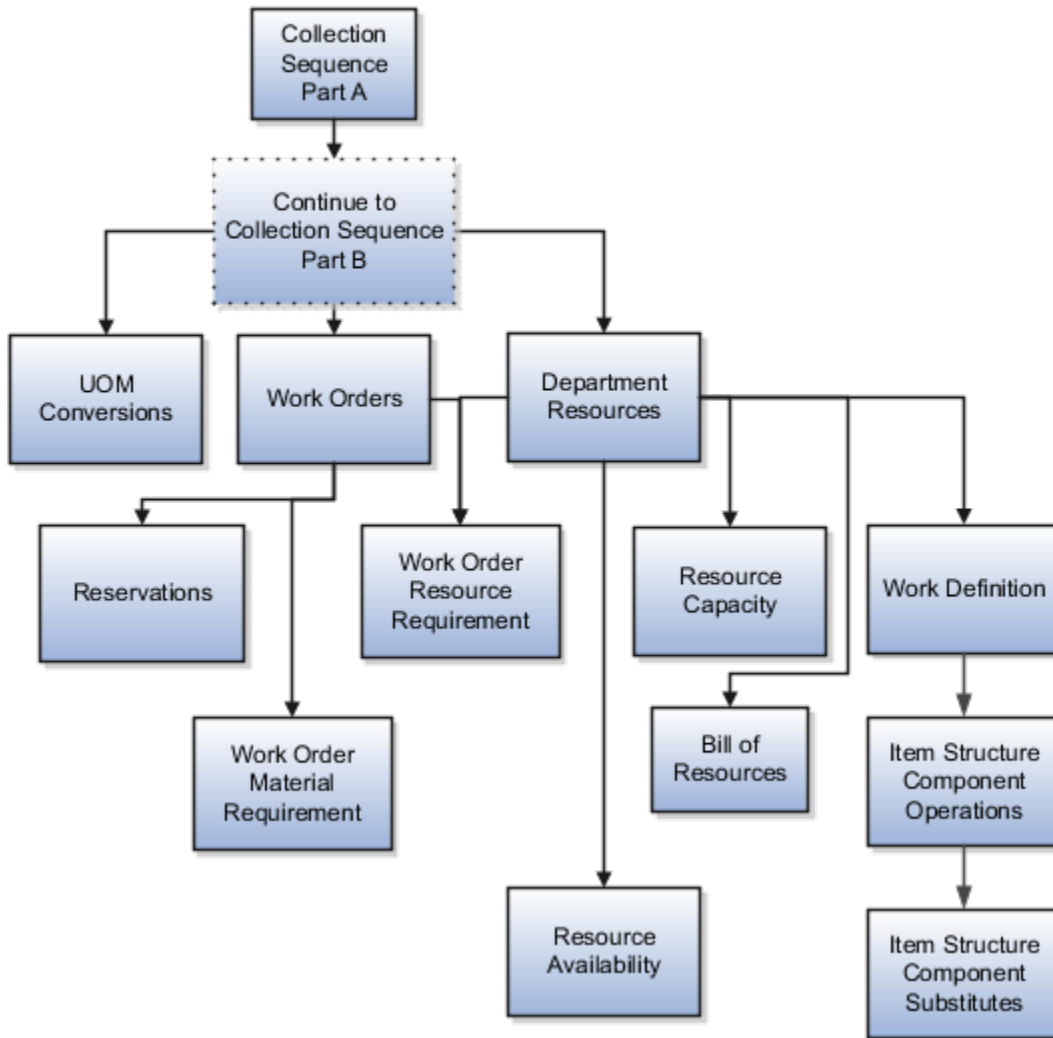
Collections Sequence Part B for Sales Orders and Assignments Sets



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

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

Collection Sequence Part B for Work Orders, Work Definitions, and Item Structures



Import Templates Used to Create CSV Files for Supply Chain Planning

You can use the Microsoft Excel templates (XLSM files) to prepare the data for the supported collection entities.

The templates are listed in the following guide: File-Based Data Import (FBDI) for SCM. Extract the templates to a local drive, enter appropriate data as described in the template, and generate CSV files. Compress the CSV files to a zipped file format and upload the .zip file to the Universal Content Manager using the File Import and Export utility. The data is then loaded from the Universal Content Manager to the planning data repository.

Collect Data from the Oracle Fusion Source

The following table lists the collections entities that can be loaded into the planning data repository for the Oracle Fusion source. The Collection Entity column provides the name of the entities for which you can collect the data.

The XLSM File Name column provides the template name that you will download for the respective collection entity. Download the XLSM template from the File-Based Data Import (FBDI) for SCM guide. The Link in Data Import Guide column provides the name of the topic in the FBDI guide from where you will download the template. For example, to collect data for the Item Costs collection entity, refer to the Item Cost Import topic in the FBDI guide.

Collections Entity	Link in Data Import Guide	XLSM File Name
Item Costs	Supply Chain Planning Item Cost	ScpItemCostImportTemplate.xlsm
Customer Specific Item Relationships	Supply Chain Planning Item Substitute	ScpItemSubstitutImportTemplate.xlsm
Planners	Supply Chain Planning Planners	ScpPlannersImportTemplate.xlsm
Item Suppliers	Supply Chain Planning Approved Supplier List	ScpApprovedSupplierListImportTemplate.xlsm
Demand Classes	Supply Chain Planning Demand Classes	ScpDemandClassImportTemplate.xlsm
Allocation Assignments and Allocation Rules	Supply Chain Planning Planning Allocation Rules	ScpPlanningAllocationRulesImportTemplate.xlsm
ATP Assignments and ATP Rules	Supply Chain Planning Available-to-Promise Rules	ScpATPRulesImportTemplate.xlsm
Supply Update Rules	Supply Chain Planning Real Time Supply Updates	ScpRealTimeSupplyUpdatesImportTemplate.xlsm
Measures	Supply Chain Planning Measures	ScpMeasuresImportTemplate.xlsm Note: You must use separate CSV files to collect measure data for measures with different dimensional granularity.
Booking History	Supply Chain Planning Bookings History	ScpBookingHistoryImportTemplate.xlsm
Option Booking History	Supply Chain Planning Option Bookings History	ScpOptionBookingHistoryImportTemplate.xlsm
Shipment History	Supply Chain Planning Shipments History	ScpShipmentHistoryImportTemplate.xlsm
Option Shipment History	Supply Chain Planning Option Shipments History	ScpOptionShipmentHistoryImportTemplate.xlsm
Price Lists	Supply Chain Planning Price List	ScpPriceListImportTemplate.xlsm
Causal Factors	Supply Chain Planning Causal Factors	ScpCausalFactorsImportTemplate.xlsm

Collections Entity	Link in Data Import Guide	XLSM File Name
Forecast Measures	Supply Chain Planning Forecast Measures	ScpForecastMeasureImportTemplate.xlsm Note: This template has been superseded by the generic template ScpMeasuresImportTemplate.xlsm, but will continue to be supported. Future enhancements will be made only to the generic measures template.
Fiscal Calendars	Supply Chain Planning Fiscal Calendars	ScpFiscalCalendarImportTemplate.xlsm
Forecasts	Supply Chain Planning External Forecasts	ScpExternalForecastImportTemplate.xlsm
Safety Stock Levels	Supply Chain Planning Safety Stock Levels	ScpSafetyStockLevelImportTemplate.xlsm
Supplier Capacity	Supply Chain Planning Approved Supplier Capacity	ScpApprovedSupplierCapacityImportTemplate.xlsm
Planned Order Supplies	Supply Chain Planning Planned Order Supply	ScpPlannedOrderSupplyImportTemplate.xlsm Note: This template is only used to load planned order supply to Global Order Promising.
Sourcing Rule and Assignments	Supply Chain Planning Sourcing Rules	ScpSourcingImportTemplate.xlsm
Cross-Reference Mapping Information	Supply Chain Planning Cross-Reference Data	ScpCrossReferenceDataImportTemplate.xlsm

Collect Data from External Source - Version Others

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

Collections Entity	Link in Data Import Guide	XLSM File Name
Item Costs	Supply Chain Planning Item Cost	ScpltemCostImportTemplate.xlsm
Customer Specific Item Relationships	Supply Chain Planning Item Substitute	ScpltemSubstitutelImportTemplate.xlsm

Collections Entity	Link in Data Import Guide	XLSM File Name
Planners	Supply Chain Planning Planners	ScpPlannersImportTemplate.xlsx
Organizations (Warehouses) and Organization Site (Including Organization Site - Internal Location Mapping)	Supply Chain Planning Organizations	ScpOrganizationImportTemplate.xlsx
Subinventories	Supply Chain Planning Subinventories	ScpSubInventoryImportTemplate.xlsx
Suppliers and Supplier Sites	Supply Chain Planning Suppliers	ScpPlanningSupplierImportTemplate.xlsx
Item Suppliers	Supply Chain Planning Approved Supplier List	ScpApprovedSupplierListImportTemplate.xlsx
Interlocation Shipping Networks	Supply Chain Planning Interlocation Shipping Methods	ScpInterLocationShipMethodsImportTemplate.xlsx
Currencies, Currency Conversion Types, and Currency Conversion Rates	Supply Chain Planning Currencies	ScpCurrencyImportTemplate.xlsx
Units of Measure, Units of Measure Conversions, and Units of Measure Class Conversions	Supply Chain Planning Units of Measure	ScpUOMImportTemplate.xlsx
Calendars, Calendar Exceptions, Calendar Shifts, Week Start Dates, Period Start Dates, and Calendar Shift Workday Pattern	Supply Chain Planning Calendars	ScpCalendarImportTemplate.xlsx
Calendar Associations	Supply Chain Planning Calendar Assignments	ScpCalendarAssignmentsImportTemplate.xlsx
Demand Classes	Supply Chain Planning Demand Classes	ScpDemandClassImportTemplate.xlsx
Ship Mode of Transport, Ship Class of Service, and Carrier	Supply Chain Planning Carriers	ScpCarrierImportTemplate.xlsx
Allocation Assignments and Allocation Rules	Supply Chain Planning Planning Allocation Rules	ScpPlanningAllocationRulesImportTemplate.xlsx
ATP Assignments and ATP Rules	Supply Chain Planning Available-to-Promise Rules	ScpATPRulesImportTemplate.xlsx
Supply Update Rule	Supply Chain Planning Real Time Supply Updates	ScpRealTimeSupplyUpdatesImportTemplate.xlsx
Freight Terms, FOB Points, Invoicing and Accounting Rules, Shipment Priorities, Payment Terms, Return Reason, Tax Classification Code, Tax Exemption Reason, Sales Credit Type,	Supply Chain Planning Order Orchestration	ScpOrderOrchestrationImportTemplate.xlsx

Collections Entity	Link in Data Import Guide	XLSM File Name
Activity Type, Document Categories, Payment Methods, and Receipt Methods		
Measures	Supply Chain Planning Measures	ScpMeasuresImportTemplate.xlsm Note: You must use separate CSV files to collect measure data for measures with different dimensional granularity.
Booking History	Supply Chain Planning Bookings History	ScpBookingHistoryImportTemplate.xlsm
Option Booking History	Supply Chain Planning Option Bookings History	ScpOptionBookingHistoryImportTemplate.xlsm
Shipment History	Supply Chain Planning Shipments History	ScpShipmentHistoryImportTemplate.xlsm
Option Shipment History	Supply Chain Planning Option Shipments History	ScpOptionShipmentHistoryImportTemplate.xlsm
Price Lists	Supply Chain Planning Price Lists	ScpPriceListImportTemplate.xlsm
Causal Factors	Supply Chain Planning Causal Factors	ScpCausalFactorsImportTemplate.xlsm
Forecasts Measures	Supply Chain Planning Forecast Measures	ScpForecastMeasureImportTemplate.xlsm Note: This template has been superseded by the generic template ScpMeasuresImportTemplate.xlsm, but will continue to be supported. Future enhancements will be made only to the generic measures template.
Fiscal Calendars	Supply Chain Planning Fiscal Calendars	ScpFiscalCalendarImportTemplate.xlsm
Forecasts	Supply Chain Planning External Forecast	ScpExternalForecastImportTemplate.xlsm
User-Defined Hierarchies	Supply Chain Planning User-Defined Hierarchies	ScpUser-DefinedHierarchyImportTemplate.xlsm
Safety Stock Levels	Supply Chain Planning Safety Stock Levels	ScpSafetyStockLevelImportTemplate.xlsm
Supply Reservations to Sales Orders	Supply Chain Planning Reservations	ScpReservationImportTemplate.xlsm

Collections Entity	Link in Data Import Guide	XLSM File Name
On Hand	Supply Chain Planning Supply On Hand	ScpOnhandImportTemplate.xlsx
Purchase Orders, Purchase Requisitions, PO in Receiving, and In Transits	Supply Chain Planning Purchase Order Requisitions	ScpPurchaseOrderRequisitionImportTemplate.xlsx
Transfer Orders	Supply Chain Planning Transfer Orders	ScpTransferOrderImportTemplate.xlsx
Supplier Capacity	Supply Chain Planning Approved Supplier Capacity	ScpApprovedSupplierCapacityImportTemplate.xlsx
Resources and Resource Shifts	Supply Chain Planning Resources	ScpResourcesImportTemplate.xlsx
Resource Availability	Supply Chain Planning Resource Availability	ScpResourceAvailabilityImportTemplate.xlsx
Work Definition (Including mapping between Item Structures and Work Definitions), Work Definition Operations, and Work Definition Operation Resources	Supply Chain Planning Routings	ScpRoutingsImportTemplate.xlsx
Work Order Supply	Supply Chain Planning Work Order Supplies	ScpWorkOrderSuppliesImportTemplate.xlsx
Work Order Material Requirements	Supply Chain Planning Work Order Component Demands	ScpWIPComponentDemandsImportTemplate.xlsx
Work Order Resource Requirements	Supply Chain Planning Work Order Operation Resources	ScpWIPOperationResourceImportTemplate.xlsx
Planned Order Supplies	Supply Chain Planning Planned Order Supply	ScpPlannedOrderSupplyImportTemplate.xlsx
		<p>Note: This template is only used to load planned order supply to Global Order Promising.</p>
Sourcing Rule and Assignments	Supply Chain Planning Sourcing Rules	ScpSourcingImportTemplate.xlsx
Cross Reference Mapping Information	Supply Chain Planning Cross-Reference Data	ScpCrossReferenceDataImportTemplate.xlsx
Key Customer Options	Supply Chain Planning Key Customer Options	ScpKeyCustomerOptionsImportTemplate.xlsx

Collect Data from External Source - Version External

The following table lists the collections entities that can be loaded into the planning data repository from an external source, where the version is External. The Collection Entity column provides the name of the entities for which you can collect the data. The XLSM File Name column provides the template name that you will download for the respective collection entity. Download the XLSM template from the File-Based Data Import (FBDI) for SCM guide. The Link in Data

Import Guide column provides the name of the topic in the File-Based Data Import (FBDI) for SCM guide from where you will download the template. For example, to collect data for the Items and Item Costs collection entities, refer to the Item Cost Import topic in the File-Based Data Import (FBDI) for SCM guide. All the planning-related entity names are prefixed with Supply Chain Planning in the FBDI guide.

Collection Entities	Link in FBDI Guide	XLSM File Name
Items	Supply Chain Planning Items	ScpltemImportTemplate.xlsm
Item Costs	Supply Chain Planning Item Cost	ScpltemCostImportTemplate.xlsm
Item Relationships	Supply Chain Planning Item Substitute	ScpltemSubstitutelImportTemplate.xlsm
Catalogs, Categories, and Item Categories	Supply Chain Planning Catalogs	ScpCatalogImportTemplate.xlsm.xlsm
Item Structures	Supply Chain Planning Item Structures	ScpBillofMaterialImportTemplate.xlsm
Bill of Resources	Supply Chain Planning Bill of Resources	ScpBillofResourcesImportTemplate.xlsm
Planners	Supply Chain Planning Planners	ScpPlannersImportTemplate.xlsm
Customers and Customer Sites	Supply Chain Planning Customers	ScpCustomerImportTemplate.xlsm
Regions	Supply Chain Planning Regions	ScpRegionsImportTemplate.xlsm
Zones	Supply Chain Planning Zones	ScpZonesImportTemplate.xlsm
Region-Zone Mapping	Supply Chain Planning Region Zone Mappings	ScpRegionZoneMappingImportTemplate.xlsm
Locations and Region-Location Mapping	Supply Chain Planning Locations	ScpLocationsImportTemplate.xlsm
Organizations and Organization Sites	Supply Chain Planning Organizations	ScpOrganizationImportTemplate.xlsm
Subinventories	Supply Chain Planning Subinventories	ScpSubInventoryImportTemplate.xlsm
Suppliers and Supplier Sites	Supply Chain Planning Suppliers	ScpSupplierImportTemplate.xlsm
Item Suppliers (Approved Supplier List)	Supply Chain Planning Approved Supplier List	ScpApprovedSupplierListImportTemplate.xlsm
Interlocation Shipping Networks and Transit Times	Supply Chain Planning Interlocation Shipping Methods	ScpInterLocationShipMethodsImportTemplate.xlsm
Currencies and Currency Conversions	Supply Chain Planning Currencies	ScpCurrencyImportTemplate.xlsm

Collection Entities	Link in FBDI Guide	XLSM File Name
Units of Measure, Units of Measure Conversions, and Units of Measure Class Conversions	Supply Chain Planning Units of Measure	ScpUOMImportTemplate.xlsxm
Calendars, Calendar Exceptions, Shifts, Shift Workday Pattern, Week Start Dates, and Period Start Dates	Supply Chain Planning Calendars	ScpCalendarImportTemplate.xlsxm
Calendar Associations	Supply Chain Planning Calendar Assignments	ScpCalendarAssignmentsImportTemplate.xlsxm
Demand Classes	Supply Chain Planning Demand Classes	ScpDemandClassImportTemplate.xlsxm
Carrier, Ship Mode of Transport, and Ship Class of Service	Supply Chain Planning Carriers	ScpCarrierImportTemplate.xlsxm
GOP Allocation Rules and Rule Assignments	Supply Chain Planning Planning Allocation Rules	ScpPlanningAllocationRulesImportTemplate.xlsxm
GOP ATP Rules and Rule Assignments	Supply Chain Planning Available-to-Promise Rules	ScpATPRulesImportTemplate.xlsxm
GOP Supply Update Rules	Supply Chain Planning Real Time Supply Updates	ScpRealTimeSupplyUpdatesImportTemplate.xlsxm
Order Orchestration Reference Objects: Freight Terms, FOB Points, Invoicing and Accounting Rules, Shipment Priorities, Payment Terms, Return Reason, Tax Classification Code, Tax Exemption Reason, Sales Credit Type, Activity Type, Document Categories, Payment Methods, and Receipt Methods	Supply Chain Planning Order Orchestration	ScpOrderOrchestrationImportTemplate.xlsxm
Cross Reference Mapping Information	Supply Chain Planning Cross-Reference Data	ScpCrossReferenceDataImportTemplate.xlsxm
Measures	Supply Chain Planning Measures	ScpMeasuresImportTemplate.xlsxm Note: You must use separate CSV files to collect measure data for measures with different dimensional granularity.
Booking History	Supply Chain Planning Bookings History	ScpBookingHistoryImportTemplate.xlsxm
Option Booking History	Supply Chain Planning Option Bookings History	ScpOptionBookingHistoryImportTemplate.xlsxm
Shipment History	Supply Chain Planning Shipments History	ScpShipmentHistoryImportTemplate.xlsxm

Collection Entities	Link in FBDI Guide	XLSM File Name
Option Shipment History	Supply Chain Planning Option Shipments History	ScpOptionShipmentHistoryImportTemplate.xlsm
Price Lists	Supply Chain Planning Price Lists	ScpPriceListImportTemplate.xlsm
Causal Factors	Supply Chain Planning Causal Factors	ScpCausalFactorsImportTemplate.xlsm
Forecast Measures	Supply Chain Planning Forecast Measures	ScpForecastMeasureImportTemplate.xlsm Note: This template has been superseded by the generic template ScpMeasuresImportTemplate.xlsm, but will continue to be supported. Future enhancements will be made only to the generic measures template.
Fiscal Calendars	Supply Chain Planning Fiscal Calendars	ScpFiscalCalendarImportTemplate.xlsm
Measures, Sales and Operations Planning Backlog, Inventory, and Production History	Supply Chain Planning Measures	ScpMeasuresImportTemplate.xlsm Note: You must use separate CSV files to collect measure data for measures with different dimensional granularity.
User-Defined Hierarchies	Supply Chain Planning User-Defined Hierarchies	ScpUser-DefinedHierarchyImportTemplate.xlsm
Forecasts	Supply Chain Planning External Forecasts	ScpExternalForecastImportTemplate.xlsm
Sales Orders	Supply Chain Planning Sales Orders	ScpSalesOrderImportTemplate.xlsm
Safety Stock Levels	Supply Chain Planning Safety Stock Levels	ScpSafetyStockLevelImportTemplate.xlsm
Supply Reservations to Sales Orders	Supply Chain Planning Reservations	ScpReservationImportTemplate.xlsm
On Hand	Supply Chain Planning Supply On Hand	ScpOnhandImportTemplate.xlsm
Purchase Orders, Purchase Requisitions, PO in Receiving, In Transits	Supply Chain Planning Purchase Order Requisitions	ScpPurchaseOrderRequisitionImportTemplate.xlsm
Transfer Orders (including expense type transfers)	Supply Chain Planning Transfer Orders	ScpTransferOrderImportTemplate.xlsm

Collection Entities	Link in FBDI Guide	XLSM File Name
Supplier Capacity	Supply Chain Planning Approved Supplier Capacity	ScpApprovedSupplierCapacityImportTemplate.xlsx
Resources, Resource Shifts	Supply Chain Planning Resources	ScpResourceImportTemplate.xlsx
Resource Availability	Supply Chain Planning Resource Availability	ScpResourceAvailabilityImportTemplate.xlsx
Work Definition (including mapping between Item Structures and Work Definitions), Work Definition Operations, Work Definition Operation Resources	Supply Chain Planning Routings	ScpRoutingsImportTemplate.xlsx
Work Order Supply	Supply Chain Planning Work Order Supplies	ScpWorkOrderSuppliesImportTemplate.xlsx
Work Order Material Requirements	Supply Chain Planning Work Order Component Demands	ScpWIPComponentDemandsImportTemplate.xlsx
Work Order Resource Requirements	Supply Chain Planning Work Order Operation Resources	ScpWIPOperationResourceImportTemplate.xlsx
Planned Order Supplies	Supply Chain Planning Planned Order Supply	ScpPlannedOrderSupplyImportTemplate.xlsx
		<p>Note: This template is only used to load planned order supply to Global Order Promising.</p>
Sourcing Rule and Assignments	Supply Chain Planning Sourcing Rules	ScpSourcingImportTemplate.xlsx
Key Customer Options	Supply Chain Planning Key Customer Options	ScpKeyCustomerOptionsImportTemplate.xlsx

Related Topics

- [Run the Load Planning Data from Files Process](#)

Run the Load Planning Data from Files Process

To load planning data from files, first you must prepare the data you want to load.

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

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

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

2. From one of the Supply Chain Planning work areas or Setup and Maintenance work area, Supply Chain Planning offering, select the Load Planning Data from Files task.
3. Complete the following parameters on the Load Planning Data from Files page:
 - a. Select the source system.
 - b. Select Collection Type: **Net change** or **Target**.
 - c. Select the .zip file you previously imported into the Universal Content Manager.
4. Click **Submit**. Make a note of the process ID. You will need this process ID to review the status of the process.

Related Topics

- [Create CSV Files to Load Planning Data](#)

Load Planning Data from Files for a Selected Group of Organizations

When you load planning data from files for the net change or targeted collection type, you can enable organization group collection and then select an organization group.

Data is collected for only the organizations in the organization group, and the purge of data before the load of the new data is also done for only the organizations in the organization group. That is, previously collected data for organizations that aren't included in the organization group is retained when you're doing collections using the file-based data import (FBDI) process.

Note: Enabling organization group collection isn't applicable to reference entities and entities for Oracle Demand Management, such as history, measures, and price lists.

Parameters for the Load Planning Data from Flat Files Scheduled Process

These are the parameters for the **Load Planning Data from Flat Files** scheduled process:

- Source System: The source system for the data determines which organization groups are applicable.
- Collection Type: You must select **Net change** or **Targeted**.
- Data File: The file previously uploaded to the Oracle WebCenter Content server.
- Enable Organization Group Collection: Select **Yes** for this parameter.
- Organization Group: Select an organization group.

Organization Groups

The organization group you can select for the Organization Group parameter is determined by:

- Which source system you select for the Source System parameter
- What organization groups are set up for that source system

You set up organization groups in the Manage Organization Groups dialog box that you open from the Organizations tab on the Maintain Supply Network Model page.

Example

Here's an example that shows how data is retained for organizations in other organization groups when you load planning data for a selected organization group.

For this example, let's say you've three organizations and two organization groups, and the source for your data is the EX1 source system.

- Organization group OG1 includes organization M1.
- Organization group OG2 includes organizations B1 and B2.

First, you load planning data for the OG1 organization group for the Work Order Supplies entity. Two rows of data are collected for the OG1 organization group.

Item	Organization	Order Type	Order Quantity	Suggested Due Date
Item 1	EX1:M1	Work order	10	2/14/22
Item 2	EX1:M1	Work order	15	2/11/22

Then, you load planning data for the OG2 organization group for the Work Order Supplies entity.

- Three rows of data are collected for the OG2 organization group.
- The two rows that were previously collected for the OG1 organization group are retained.

Item	Organization	Order Type	Order Quantity	Suggested Due Date
Item 1	EX1:M1	Work order	10	2/14/22
Item 2	EX1:M1	Work order	15	2/11/22
Item 1	EX1:B1	Work order	11	2/09/22
Item 1	EX1:B2	Work order	16	1/31/22
Item 2	EX1:B2	Work order	10	2/09/22

Applicable Entities

You can use FBDI templates to load data for organization groups for these entities:

Source	Entities
From an Oracle Fusion Cloud SCM source	<ul style="list-style-type: none"> External Forecasts Planned Order Supply Safety Stock Levels
From an Oracle Fusion Cloud SCM source for which you've selected the Enable external data check box and other check boxes in the Select Data Sources dialog box that you open from the Setup and Maintenance work area, Supply Chain Planning Configuration functional area, Manage Planning Source Systems page	<ul style="list-style-type: none"> On Hand Transfer Orders Purchase Orders and Purchase Requisitions Sales Order and Associated Reservations Work Order Component Demands Work Order Supplies, Work Order By-Product and Co-Product Supplies, Work Order Operation Resources Resource Availability <p>Note: These entities are in addition to those mentioned in the previous row for the Oracle Fusion Cloud SCM source.</p>
From an external source	<ul style="list-style-type: none"> External Forecasts Movement Requests Planned Order Supply Purchase Orders and Purchase Requisitions Reservations Safety Stock Levels Sales Orders Transfer Orders On Hand Work Order Component Demands Work Order Supplies, Work Order By-Product and Co-Product Supplies, Work Order Operation Resources Resource Availability

More Details About Using Organization Groups for Loading Data

Here are a few more details to know about loading planning data from files for a selected group of organizations:

- If you've included the history, measures, or price list entities in a data file used during collections with organization group collection enabled, collections will be done for these entities for all organizations and not just the organizations in the groups.
- If you've included reference data entities in a data file used during collections with organization group collection enabled, these entities will be ignored.

- Data security created and enabled at the organization level for any role isn't applied to organization groups.
- You can submit the **Load Planning Data from Flat Files** scheduled process multiple times to specify a different organization group for each submission. The submissions are processed in the order of submission.
- You can specify an organization group when you submit the **Load Planning Data from Flat Files** scheduled process or when using a scheduled process job set.
- You can specify an organization group when you submit the **Load Planning Data from Flat Files** scheduled process using the ERP Integrations REST resource.
- If you use the Collect Planning Data page to collect some of your data, note that you can use organization groups for only the net change collection type. For the targeted collection type, you must use the collection filter named Organizations Filter for Transaction Data.

Related Topics

- [Enable External Data Collection for the Oracle Fusion Source System](#)
- [Enable Organization Group Collection for the Net Change Collection Type](#)

Improve Performance of Measure Disaggregation

Overview of Improving Performance While Disaggregating Measure Data

While importing data at an aggregate level to stored measures for Oracle Fusion Cloud Supply Chain Planning, you can improve the performance by enabling multithreading for the disaggregation process.

While using the file-based data import (FBDI) template named Supply Chain Planning Measures, you can import data at the stored levels or aggregate levels of the stored levels. For example, if your measure is configured with the dimension levels of Item, Organization, Sales Rep, Customer Site, Demand Class, and Day, you can import data at these stored levels or aggregate levels, such as product category, business unit, sales organization level, customer, demand class, and month.

Measure data that's collected at an aggregate level is disaggregated to the stored levels during the data refresh step in a plan run or when you incrementally refresh a plan after loading new measure data.

By default, the process for disaggregating the measure data is single-threaded. Consequently, long processing times can result when there's a large volume of measure data to disaggregate.

To improve performance, you can configure disaggregation to run as a multithreaded process. The disaggregation process runs in parallel for different time ranges within the time range for the collected measure data.

The multithreaded process runs in 90-day increments by default. For example, if you've collected measure data at an aggregate level for the past year (365 days), then the process runs five disaggregation jobs in parallel, four jobs of 90 days each and one job for the remaining five days of data.

You can do the following:

- Enable multithreading for measure data disaggregation for all plans in the Demand Management, Demand and Supply Planning, Planning Central, Replenishment Planning, Sales and Operations Planning, or Supply Planning work area.
- Enable multithreading for measure data disaggregation for a single plan that's enabled for demand forecasting.
- Override the default of 90 days for the multithreaded process.

Related Topics

- [Enable Multithreading for Measure Data Disaggregation for All Plans](#)
- [Enable Multithreading for Measure Data Disaggregation for a Single Plan](#)
- [Override the Default Value for the Multithreaded Process](#)

Enable Multithreading for Measure Data Disaggregation for All Plans

You can enable multithreading for measure data disaggregation for all demand, demand and supply, replenishment, sales and operations, or supply plans.

Before you start

You may need to work with someone who has administration privileges to make these profile-related changes.

Here's what to do

1. In the Demand Management, Demand and Supply Planning, Plan Inputs, Planning Central, Replenishment Planning, Sales and Operations Planning, or Supply Planning work area, on the Tasks panel tab, under Configuration, select **Manage Planning Profile Options**.

The Manage Planning Profile Options page opens.

2. Search for the SCP_PARAMETER_OVERRIDES profile option code.
3. If the SCP_PARAMETER_OVERRIDES profile option code exists, then click the **New** icon.
A new row appears for the profile value.
4. Add the profile value as follows:
 - o Profile Level: Select **Site** to set the value globally for all users. Select **User** to set the value for a specific user, in which case you must then select a user. User-level values take precedence over the site-level value.
 - o Profile Value: Enter **enableParallelDisaggMeasure=true**.

Note: You can enter multiple profile values for a profile level provided you separate them with the space or semicolon. Whether you can select the site or user depends on the enabled levels in the profile option.

5. Click **Save and Close**.
6. If the SCP_PARAMETER_OVERRIDES profile option code doesn't exist, then follow these steps:
 - a. In the Setup and Maintenance work area, go to the **Manage Profile Options** task.
The Manage Profile Options page opens.
 - b. Click **New**.
The Create Profile Option page opens.
 - c. Create the profile option as follows:
 - Profile Option Code: SCP_PARAMETER_OVERRIDES
 - Profile Display Name: SCP_PARAMETER_OVERRIDES
 - Application: Planning Common
 - Module: Planning Common
 - Start Date: Current dateLeave the remaining fields blank.
7. Click **Save and Close**.
8. For the profile option levels for the profile option, select the check boxes under the **Enabled** and **Updatable** columns for both the Site and User levels.
9. Click **Save and Close**.

10. In your work area, open the Manage Planning Profile Options page.
11. Search for the SCP_PARAMETER_OVERRIDES profile option code.
12. Set the profile level and value as previously explained.
13. Click **Save and Close**.

Related Topics

- [Overview of Improving Performance While Disaggregating Measure Data](#)
- [Enable Multithreading for Measure Data Disaggregation for a Single Plan](#)
- [Override the Default Value for the Multithreaded Process](#)

Enable Multithreading for Measure Data Disaggregation for a Single Plan

You can enable multithreading for measure data disaggregation for a single, forecast-enabled plan in the Demand Management, Demand and Supply Planning, Planning Central, Replenishment Planning, or Sales and Operations Planning work area.

1. In your work area, open the Plan Options page for your forecast-enabled plan.
2. On the Demand tab, click **Select Advanced Options**.
The Demand: Advanced Options dialog box opens.
3. In Forecasting Control Parameters, in **Parameter Overrides**, enter **enableParallelDisaggMeasure=true**.

Note: You can enter multiple values in the **Parameter Overrides** field provided you separate them with the number sign (#).

4. Click **Done**.
5. Save your plan.

Related Topics

- [Overview of Improving Performance While Disaggregating Measure Data](#)
- [Enable Multithreading for Measure Data Disaggregation for All Plans](#)
- [Override the Default Value for the Multithreaded Process](#)

Override the Default Value for the Multithreaded Process

After you've enabled multithreading for the measure disaggregation process for all plans in your work area or a single, forecast-enabled plan, you can override the default value of 90 days for the process.

Before you start

You may need to work with someone who has administration privileges to make these profile-related changes.

Here's what to do

1. In the Setup and Maintenance work area, go to the **Manage Profile Options** task.
The Manage Profile Options page opens.
2. Click **New**.
The Create Profile Option page opens.

3. Create a profile option as follows:

- Profile Option Code: MSC_DISAGG_PERF_BATCH_SIZE
- Profile Display Name: MSC_DISAGG_PERF_BATCH_SIZE
- Application: Planning Common
- Module: Planning Common
- Start Date: Current date

Leave the remaining fields blank.

4. Click **Save and Close**.

5. For the profile option levels for the profile option, select the check boxes under the **Enabled** and **Updatable** columns for both the Site and User levels.

6. Click **Save and Close**.

7. In the Demand Management, Demand and Supply Planning, Plan Inputs, Planning Central, Replenishment Planning, Sales and Operations Planning or Supply Planning work area, on the Tasks panel tab, in Configuration, select **Manage Planning Profile Options**.

The Manage Planning Profile Options page appears.

8. Search for the MSC_DISAGG_PERF_BATCH_SIZE profile option code.

9. Click the **New** icon.

A new row appears for the profile value.

10. Add the profile value as follows:

- Profile Level: Select **Site** to set the value globally for all users. Select **User** to set the value for a specific user, in which case you must then select a user. User-level values take precedence over the site-level value.
- Profile Value: Enter the number of days for processing in each parallel job.

11. Click **Save and Close**.

Related Topics

- [Overview of Improving Performance While Disaggregating Measure Data](#)
- [Enable Multithreading for Measure Data Disaggregation for All Plans](#)
- [Enable Multithreading for Measure Data Disaggregation for a Single Plan](#)

Collections for Oracle Replenishment Planning

This topic explains how collections are done for Oracle Replenishment Planning.

Collections are done at the organization level.

Collections are also done for all subinventories of organizations that are marked for subinventory-level planning on the Organizations tab on the Maintain Supply Network Model page.

Collected Business Objects That Are Relevant for Replenishment Planning

This table lists the collected business objects that are relevant for replenishment planning:

Oracle Fusion Cloud Applications	Business Object
Oracle Fusion Cloud Procurement and Oracle Fusion Cloud Inventory Management	<ul style="list-style-type: none"> • Purchase orders and requisitions • Suppliers • Approved supplier lists • Units of measure (UOMs) • Transfer orders • Shipping methods • Subinventories • On-hand inventory
Oracle Fusion Cloud Product Lifecycle Management	<ul style="list-style-type: none"> • Items • Organizations • Catalogs
Oracle Cost Management, Oracle Order Management, and others	<ul style="list-style-type: none"> • Item costs • Currencies • Calendars and fiscal calendars • Sales orders • Bookings history • Shipments history • Transfer order history • Price lists

Related Topics

- [How You Maintain Your Supply Network Model](#)
- [How You Set Up Replenishment Planning for Subinventories](#)

Collection of Consumption Data for Oracle Replenishment Planning

This topic discusses the collection of consumption inventory transactions or point-of-sale (POS) data from Oracle Fusion Inventory Management for the generation of consumption-based forecasts in Oracle Replenishment Planning.

To generate consumption-based forecasts for your replenishment plan, make these selections on the Collect Planning Data page:

- On the Parameters tab, for the Targeted collection type, under History Data Options on the Demand Planning Data tab, in **Organization - Consumption Inventory Transactions to Include**, select the types of consumption inventory transactions you want to collect at the organization level. If you select **Transfer orders**, historical

transfer orders at the organization level are collected. If you select **All**, all historical consumption inventory transactions at the organization level are collected.

- In **Subinventory - Consumption Inventory Transactions to Include**, select the types of consumption inventory transactions you want to collect at the subinventory level. If you select **Transfer orders**, both historical transfer orders and historical movement requests at the subinventory level are collected. If you select **All**, all historical consumption inventory transactions at the subinventory level are collected.

Consumption-based forecasting provides you with these benefits:

- You can improve the effectiveness of your forecast by basing it on demand signals that are closest to your customers.

Thereby, you can effectively compute your policy parameters and calculate and release your replenishment orders.

- In the retail and healthcare sectors, you can model stores and departments as subinventories. By collecting consumption inventory transactions at the subinventory level, you can generate forecasts at this level.

Historical Transaction Collections for Consumption-Based Forecasting at the Organization Level

When you select **All** in the **Organization - Consumption Inventory Transactions to Include** field, all historical transactions are collected at the organization level from Inventory Management for consumption-based forecasting except for those listed in this table:

Transaction Action	Transaction Source	Transaction Type
Issue from stores	Purchase Order	Return to Supplier
Issue from stores	Sales Order	Sales Order Issue
Issue from stores	Transfer Order Return	Transfer Order Return with Scrap

Item Transaction Collections for Consumption-Based Forecasting at the Subinventory Level

When you select **All** in the **Subinventory - Consumption Inventory Transactions to Include** field, all item transactions are collected at the subinventory level from Inventory Management for consumption-based forecasting except for those listed in this table:

Transaction Action	Transaction Source	Transaction Type
Direct organization transfer	Transfer Order Return	Transfer Order Return Transfer
Intransit shipment	Transfer Order Return	Transfer Order Return Shipment
Issue from stores	Purchase Order	Return to Supplier

Transaction Action	Transaction Source	Transaction Type
Issue from stores	Transfer Order Return	Transfer Order Return with Scrap
Staging transfer	Transfer Order Return	Transfer Order Return Pick

Difference Between Consumption History and Shipments History

While shipments history includes the history for shipped sales orders, consumption history includes the shipments history as well as the consumption-related history that falls under transaction actions such as Issue from stores.

Measures for Storing Collected or Uploaded Consumption Data

If you're collecting consumption data from Inventory Management, the collected data is stored in the measure that you select in the **Shipments History Measures** field under History Measures and Attributes on the Demand Planning Data tab.

If you're uploading consumption data from an external source, use the file-based data import (FBDI) template named Supply Chain Planning Measures (ScpMeasuresImportTemplate.xlsx) to import consumption data into the predefined Consumption History measure.

In the import template, enter #ignore under the **Customer Level Name** and **Demand Class Level Name** columns if you don't want to specify these levels. Don't enter values in the columns for level member names.

ERP Integrations REST Service

Use of ERP Integrations REST Service in Collections

You can upload all reference and transactional data to Oracle Fusion Cloud Supply Chain Planning from an external source using the ERP Integrations REST service. This external source can be data from Oracle E-Business Suite, Oracle Fusion Cloud Applications, or third-party source. In Collections, this REST service is used to upload data and submit the collection job set.

Overview

This service updates all key changes in supply chain operations like unexpected changes in inventory levels or manufacturing capacities in your application in real-time. Hence when compared to the system that relies on batch integration and synchronizes data only on periodic basis, this system provides accurate results.

Note: To upload data for Oracle Supply Chain Planning products, use of ERP Integrations REST service is preferred over use of ERP Integrations SOAP Service.

ERP Integrations REST Service

The ERP Integrations REST service that is available as part of Oracle Fusion Cloud Financials is used with Oracle Fusion Cloud Supply Chain Planning products to import bulk data, upload files to UCM server, and to load planning data from flat files. The REST resource name is ERP Integrations and it supports multiple POST operations.

This topic provides specific guidelines on how to use these REST operations with Oracle Supply Chain Planning products. For the Oracle Financials documentation regarding the ERP Integrations REST service, refer to the REST API for Oracle Fusion Cloud Financials book, ERP Integrations task, in Oracle Help Center.

Import Bulk Data

The ERP Integration Service importBulkData is the main REST operation that's used to import data for Oracle Supply Chain Planning. This is a multistep operation that invokes the following subprocesses to complete the data load:

1. Upload file content to UCM Server
2. Loads data into Planning staging tables
3. Launches Load Planning Data from Files scheduled process
4. Launches the Collect Planning Data Job Set

This operation is completed in a single API call and also handles encrypted data files and decrypts them as part of upload.

Here are the specific parameters that are used in the importBulkData REST operation.

- **JobName:** For Oracle Supply Chain Planning data loads, this parameter must be specified as `JobName: /oracle/apps/ess/scm/advancedPlanning/collection/configuration/CSVController`
- **Parameter List:** This parameter contains a comma separated list of the parameter values. This is used by the Load Planning Data from Files scheduled process that is launched as part of this REST service operation. Here are the parameters that are used in the parameter list.

Parameters

Scheduled Process Internal Parameter	Maps to the displayed parameter of this process	Expected Value	Parameter Details
Parameter 1	Source System	Source System	Source system code of the source system for which the data is being uploaded. This code is specified during the set up of the source system
Parameter 2	Collection Type	1 or 2	Type of collections to be launched. Valid values are: <ul style="list-style-type: none"> ○ 1 denotes Targeted Collection type ○ 2 denotes Net change Collection type
Parameter 3	Data File	Zip File name	Name of the zip file to be uploaded.

Scheduled Process Internal Parameter	Maps to the displayed parameter of this process	Expected Value	Parameter Details
Parameter 4	Not displayed	Not used	Specify as #NULL.
Parameter 5	Not displayed	Document ID (DId) Value	Document ID of the zip file to be uploaded to UCM. Optional when using importBulkData operation but mandatory when using the submitEssJobRequest operation.
Parameter 6	Not displayed	Instance ID	Internal ID of the source system specified in Parameter 1 (instance code). This is stored internally as MSC_APPS_INSTANCES.INSTANCE_ID and can be derived using the following SQL query: <pre>SELECT instance_id FROM msc_apps_instances WHERE instance_code = '<instance code>'</pre>
Parameter 7	Not displayed	Apps Version	Internal value of the version of the source system specified in Parameter 1 (instance code). This is stored internally as MSC_APPS_INSTANCES.APPS_VER and can be derived using the following SQL query: <pre>SELECT apps_ver FROM msc_apps_instances WHERE instance_code = '<instance code>'</pre>
Parameter 8	Not displayed	Not used	Specify as #NULL.
Parameter 9	Organization Group	Organization Group	This is optional. It is required only if the user wants to run collections for a specific organization group. The value is the name of the organization group. If not specifying, use #NULL.

Parameters File

You must include the special parameters file Supply Chain Planning ERP Integration Service Parameters that's generated using the ScpErpIntegrationServiceParamsImportTemplate.xlsm template file when using ERP Integrations REST service with Oracle Supply Chain Planning products. This parameters file is the file that provides metadata that you need to include in the zip file along with other CSV files to load data in the ERP Integrations Flow. This file contains the following parameters:

- Source System Code (Parameter 1 in the Parameters table)
- Collection Type (Parameter 9 in the Parameters table)
- Organization Group (Parameter 9 in the Parameters table)

If the input zip file does not contain ScpErpIntegrationServiceParams.csv, then the mode of collections is defaulted to Net change and the Load Planning Data from Flat Files schedule process reads the value of instance code from the respective data files.

The ScpErpIntegrationServiceParams.csv meta data file is required only when your loading data using the ERP Integration importBulkData operation and isn't required when you submit the Load Planning Data from Flat Files process either from the Scheduled Processes page or using the submitEssJobRequest operation.

Note: Oracle Supply Chain Planning data loads using importBulkData operation don't need any other properties files like jobDetails.properties that are required for other product areas.

Upload File to UCM

The uploadfiletoUCM operation uploads a file to the UCM server in a single step based on the document specified in the REST operation.

Here is the parameter that is used to complete the operation.

DocumentAccount: For Oracle Supply Chain Planning data loads, this parameter must be specified as

```
DocumentAccount": "scm$/planningDataLoader$/import$
```

The REST response includes the DocumentId as one of the data elements.

Load Planning Data from Flat Files

The submitEssJobRequest operation is used to load planning data from flat files. It submits the collections job set with a set of parameters in a single step.

When loading data for Oracle Supply Chain Planning products, use the following parameters and respective guidelines to complete the operation.

- JobPackageName: This parameter must be specified as
`JobPackageName: oracle/apps/ess/scm/advancedPlanning/collection/configuration`
- JobDefName: This parameter must be specified as
`JobDefName: CSVController`
- DocumentId: Use the document ID from the response of uploadFileToUCM operation.
- ESSParameters: This parameter must include a list of values as indicated for the Parameter List parameter of importBulkData operation. For example,

```
ESSParameters:EX8,2,UOM.zip,#NULL,289568,300100110961358,3,#NULL,#NULL
```

The REST response includes the RqstId as one of the data elements. This data element is the process ID of the submitted scheduled process which in this case is the Load Planning Data from Files process. This process is completed only after total flow including Collect Planning Data job set is launched and completed.

For other Oracle Supply Chain Planning processes, like the Publish Data and Release Plan processes, the recommended approach is to use the respective REST services under Oracle Supply Chain Planning group and not use the submitEssJobRequest operation. For example:

- For Publish Data – use Supply Chain Planning/Supply Chain Plans/Publish Data
- For Release Plan – use Supply Chain Planning/Supply Chain Plans/Releases
- For Archive Plan – use Supply Chain Planning/Supply Chain Plans/Archives

Note: loadAndImportData operation isn't recommended for use with Oracle Supply Chain Planning products because with this operation you can't upload encrypted data files.

Verify Collection Processes

Verify the Load Planning Data from Files Process

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

1. In the Navigator, click **Scheduled Processes**.
2. In the search area, enter the process ID you noted when you submitted during the Load Planning Data from Files process. Click **Search**.
3. Monitor the process to verify completion.

If the process completes with warnings, select the request that shows the warning status and click the **View Log** button to review the details.

4. For the rows with errors, resolve the issues found in the log file, and then upload the CSV file again. To load only the revised rows, use the Net Change option.

Review Data in the Planning Data Repository

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

To review the data collected or loaded into the planning data repository, use one of the following options:

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

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

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

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

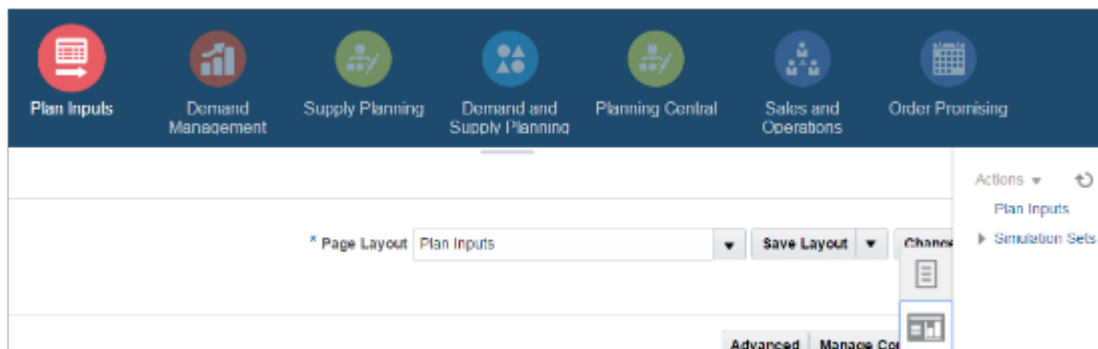
- Supply data
- Demand data

You can view Carriers and Suppliers using either option.

Review Data Using the Plan Inputs Page Layout

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

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



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

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

Review Data Using the Maintain Supply Network Model Page

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

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

Purge Data

How You Purge Collected Data from the Data Repository for Supply Chain Planning

Use the Purge Data Repository scheduled process to purge data collected by supply chain planning collections processes into the database tables that comprise the planning data repository.

Delete data from these tables to free up space and improve performance. Use the Scheduled Processes work area to run the scheduled process. This topic explains the parameters of the **Purge Data Repository** scheduled process.

The parameters for the **Purge Data Repository** scheduled process are in one of these categories:

- The Source System and Purge Global Entities parameters
- Parameters on the Reference Data tab
- Parameters on the Demand Planning Data tab
- Parameters on the Supply Planning Data tab

Note: If you're purging Customer dimension data or measure data at the Customer Site level for a demand plan that uses a planning level profile, you must manually run the **Aggregated Collected Planning Data** and **Create Trees for Dimensions** scheduled processes after you've purged the data.

The Source System and Purge Global Entities Parameters

Provide values for these parameters to determine which data records for reference data will be purged from the staging tables when you run the **Purge Data Repository** scheduled process.

Parameter	Notes
Source System	<p>You must select a source system.</p> <ul style="list-style-type: none"> • For data collected from the Oracle Fusion source system, select OPS. • For data collected from an external system, select the applicable source system code.
Purge Global Entities	<p>You can select Yes if you want to delete data for the entities for which the planning data repository stores only one record for each instance of the global entity so there's no reference to a source system. The default is No.</p>

Parameters on the Reference Data Tab

Provide values for these parameters on the Reference Data tab to determine which data records for reference data will be purged from the staging tables when you run the **Purge Data Repository** scheduled process.

Parameter	Notes
The set of entities categorized as reference entities. The entities you haven't selected yet are included in the Reference Entities list on the Reference Data tab.	You select which reference entities you want data deleted for. The entities you select are included in the Selected Entities list on the Reference Data tab.

Parameters on the Demand Planning Data Tab

Provide values for these parameters on the Demand Planning Data tab to determine which data records for demand planning data will be purged from the staging tables when you run the **Purge Data Repository** scheduled process.

Parameter	Notes
The set of entities categorized as reference entities. The entries you haven't selected yet are included in the Demand Entities list on the Demand Planning Data tab.	You select which demand entities you want data deleted for. The entities you select are included in the Selected Entities list on the Demand Planning Data tab.
Limit the Days to Purge	<p>You can choose to limit the number of days to purge by selecting one of three choices. For each choice you must also specify the additional details needed for that choice:</p> <ul style="list-style-type: none"> • By date range, followed by a from date and a to date • By number of days in the future, followed by a number of most recent days to keep • By number of days in the past, followed by either a number of most recent days to keep or a number of oldest days to purge

Parameters on the Supply Planning Data Tab

Provide values for these parameters on the Supply Planning Data tab to determine which data records for supply data will be purged from the staging tables when you run the **Purge Data Repository** scheduled process.

Parameter	Notes
The set of entities categorized as supply entities. The entities you haven't selected yet are included in the Supply Entities list on the Supply Planning Data tab.	You select which supply entities you want data deleted for. The entities you select are included in the Selected Entities list on the Supply Planning Data tab.

Related Topics

- [Purge Data Repository](#)
- [Overview of Planning Level Profiles](#)

How You Purge Staging Tables for Supply Chain Planning

Use the Purge Staging Tables scheduled process to delete data from the staging tables used during collections processes for supply chain planning.

Delete data from the staging tables to free up space and improve performance. Use the Scheduled Processes work area to run the scheduled process. This topic explains the parameters of the **Purge Staging Tables** scheduled process. For information on how to run scheduled processes, refer to the Scheduled Processes chapter in the Implementing Common Features for SCM guide.

Provide values for these parameters to determine which data records will be purged from the staging tables when you run the **Purge Staging Tables** scheduled process.

Parameter	Notes
Source System	<p>You must select a source system.</p> <ul style="list-style-type: none"> For data collected from the Oracle Fusion source system, select OPS. For data collected from an external system, select the applicable source system code.
Record Type	<p>You must select a record type, but you can select All if you want to purge all records that meet the values of the other parameters, regardless of their record type. The record types other than the All type are the status of records in the staging tables in regard to the next stage of the collections process. The next stage of the collections process is the import of the records that are in the staging tables into the tables that comprise the planning data repository.</p> <ul style="list-style-type: none"> All: All records regardless of status. Complete: Records that were successfully imported into the tables that comprise the planning data repository. Error: Records that are in the Error status in the staging tables after import into the planning data repository was tried, but not successful. New: Records that were collected into the staging tables, but import into the planning data repository hasn't been tried yet. Retry: Records in the staging tables for which import into the planning data repository is being tried again. Warning: Records in the staging tables for which a warning occurred when the record was imported into the planning data repository.
Collection Cycle ID	You can enter a request number if you want to do so.
Collected From Date and Collected To Date	You can provide these dates if you want to purge data within a specific time frame.
The set of specific entities for which data is collected and deletion of the data from the staging tables is supported.	Each entity is a parameter for the scheduled process. You can select No for any of the parameters if you don't want to purge the data for that entity. The default value for each parameter is Yes.

Aggregate Customer Data

How You Aggregate Customer Data

Use the key customer data options collections template to identify key customers.

The data for these customers will be visible. For each Zone, all non-key customers' data will be aggregated to a member named All Other. By aggregating the planning data for non-key customers, you can focus your analysis on the key customers. You use the Supply Chain Planning Key Customer Options (ScpKeyCustomerOptionsImportTemplate.xlsx) import template to identify the key customers; the rest of the customers' data will be aggregated under an All Other member.

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

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

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

Note: You can't use the functionality for aggregating data for non-key customers in a demand plan to which you've attached a planning level profile. The **Aggregate non-key customer data to an All Other level member** check box on the Demand tab on the Plan Options page is disabled if you've attached a planning level profile to the demand plan.

Related Topics

- [Collection Filters and Collection Templates](#)
- [Overview of Planning Level Profiles](#)

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

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

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

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

Related Topics

- [Considerations for Collecting Key Customer Information](#)

Considerations for Collecting Key Customer Information

Use the ScpKeyCustomerOptionsImportTemplate.xlsx file to identify the key customers for which nonaggregated data must be made available.

For non-key customers, the aggregation level that you define in the import template determines whether the data is retained or aggregated. You can differentiate between key customers and non-key customers and use the aggregated key customer data to build a plan specifically for your key customers.

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

In the ScpKeyCustomerOptionsImportTemplate.xlsx file template:

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

Ignore Aggregate by Zone

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

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

Aggregation Levels

The aggregation levels are listed in the following table.

Aggregation Level	Description
1	Retain all customer sites, and aggregate non-key customer sites. In addition to key customer data being available, non-key customer data is retained for plans that require data that's not aggregated. Aggregated customer data is available for plans that require aggregated non-key customer data.

Aggregation Level	Description
2	Aggregate non-key customer sites. Customers that aren't identified as key customers are aggregated to an All Other site by zone. However, if the Hierarchy Name and Level Name columns are blank, all customers are identified as non-key customers and aggregated to an All Other site by zone. This means that there are no key customers.
3	No aggregation of customer sites. All data is available at customer site level.

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

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

- No aggregation is done. All data is at the customer site level only.
- If option 2 or 3 was used in previous collection runs, all non-key customer by zone members and data are deleted.
- Plans using the Key Customer feature become invalid and you have to run them again.

The KeyCusOptnMembers detail tab is optional. Use this tab to identify specific customers as key customers. The Hierarchy Name and Level Name column entries must be the same as the information entered on the KeyCusOptnHeader tab. Enter valid level member names in the Level Member Name column. These members are the only customers that will be identified as key customers.

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

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

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

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

Related Topics

- [How can I reset the key customer aggregated data for a plan?](#)

Load Aggregated Customer Data from Oracle E-Business Suite

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

The procedure is composed of the following steps:

1. Extract data from your Oracle E-Business Suite source system.
2. Prepare the Supply Chain Planning Key Customer Options file if you have defined key customers in your Oracle E-Business Suite source system.

3. Add the files to your desktop or local hard drive.
4. Import data into your Oracle Supply Chain Planning destination system.

Additional details for each step are provided in this topic.

Prerequisites

To perform the process that extracts data from your Oracle E-Business Suite source system, you must be assigned a configured, administrator-level role that's similar to either the Advanced Planning Administrator role or the Advanced Supply Chain Planner role.

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

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

Extract Data

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

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

- If the MSD_DEM_CUSTOMER_ATTRIBUTE is set to null, then all sites are extracted.
- If the MSD_DEM_CUSTOMER_ATTRIBUTE is set to none, then all records are aggregated to Default Customer Site.
- If the MSD_DEM_CUSTOMER_ATTRIBUTE is set to a valid customer attribute, then all sites are extracted.

The extracted data is stored in a file in the zipped file format in the middle tier of your source system.

Prepare the Key Customer Options File

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

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

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

Add the Files to Your Desktop or Local Hard Drive

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

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

Import Data into Your Oracle Supply Chain Planning Destination System

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

1. From the Navigator, click **File Import and Export**.
2. On the File Import and Export page, perform the upload action using these values:

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

View and Refresh Collected Measure Data

View Collected Data for Measures Before Running a Plan

The Collected Measure Data table enables you to view imported or collected records and their statuses without having to examine log files or run a plan. The table lists measures that were successfully populated as well as also those that weren't for your plan. By using this table, you can quickly resolve problems in the data load process.

Just as you can use the Supplies and Demands table to view the collected or imported supplies and demands, you can use the Collected Measure Data table to view bookings, shipments, and other entities.

For example, Small Inc. imported its shipments history data using the Supply Chain Planning Shipments History file-based data import (FBDI) template. To save time and work efficiently, the company wants to ensure that data was correctly imported before running its plan. The company uses the Collected Measure Data table and selects the option to view only records with errors. The company notices that several records have an error pertaining to invalid names for the Customer Site level member. Now that the reason behind the error has been identified, Small Inc. can fix the data in the FBDI file, import the data again, and run the plan. By using the Collected Measure Data table, Small Inc. quickly identified data import-related problems and didn't have to spend time analyzing the log files for the import or analyzing the plan after running it.

1. In the Plan Inputs work area, click the **Open** drop-down button.
The Open Table, Graph, or Tile Set dialog box opens.
2. Select the Collected Measure Data table and click **OK**.
The Collected Measure Data table opens in a new tab.
3. Specify your search criteria, and click **Search**.
Use the **Errors** field to limit the records to those with errors or those without errors.

Note: By default, the table displays only the first 10,000 records that meet your search criteria. To change this limit, you need to create and use a profile option with the MSC_COLLECTED_MEASURE_DATA_MAX_ROWS code. No indication is provided if the table has records that aren't displayed because the predefined or user-defined limit has been exceeded.

4. Analyze the records that are returned according to your search criteria.
The **Last Updated Date** column displays the date on which the records were created or last updated.
The **Refresh Number** column displays the refresh numbers of the collection job sets through which the measures were populated when the FBDI templates or collections feature was used.

5. Optionally, to export the records to a Microsoft Excel file for further analysis, click **Actions > Export to Excel**.

The records available in the Collected Measure Data table are exported to the file. The predefined or user-defined limit is applied when the records are exported.

Tip: When you export the records to an Excel file, you can view more than 15 records at a time. You may find it helpful during your error analysis to view more than 15 records at a time.

Additional Points About the Collected Measure Data Table

These are some additional points about the Collected Measure Data table:

- The table displays records that are successfully uploaded to the MSC_MEASURE_DATA table.
- For records with errors, the table displays records from the MSC_ST_MEASURE_DATA staging table that have information in the ERROR_TEXT column.
The table doesn't display records from the staging table that weren't moved to the MSC_MEASURE_DATA table and don't have error information.
- The table filters records by the applicable security privileges of the user. For example, if you have access to only certain organizations, you can view measure values for only those organizations.
- The table lists both predefined and user-defined measures.
- The table displays measure data that's imported through these file-based data import (FBDI) templates:
 - Supply Chain Planning Bookings History
 - Supply Chain Planning Causal Factors
 - Supply Chain Planning Forecast Measures
 - Supply Chain Planning Measures
 - Supply Chain Planning Option Bookings History
 - Supply Chain Planning Option Shipments History
 - Supply Chain Planning Shipments History
- The table doesn't display measure data that's imported through the Supply Chain Planning External Forecasts and Supply Chain Planning Price Lists FBDI templates.
To troubleshoot imported data for external forecasts or price lists, examine the log files or run your plan.
- The table also displays any measure for which information is collected from Oracle Fusion Cloud Applications Suite or imported from Oracle E-Business Suite.
- To view aggregated non-key customer data in the table for demand, demand and supply, and sales and operations plans, before collecting or importing measure data, select the **Aggregate non-key customer data to an All Other level member** check box on the Demand tab on the Plan Options page for the plan. Then, enter the required aggregation levels in the Supply Chain Planning Key Customer Options FBDI template, and import customer data with the template. After you collect or import measure data, when you filter your records by the plan name in the table, you can view the aggregated data for non-key customers. For aggregated records, the value displayed in the **Customer** column is "<zone name>:All Other."
- The table doesn't return aggregated data for a planning level profile.
- To avoid reduced performance, don't sort the records if you increase the maximum number of records displayed in the table by creating and using a profile option with the MSC_COLLECTED_MEASURE_DATA_MAX_ROWS code.

Related Topics

- [How You Aggregate Customer Data](#)

Refresh Collected Measure Data

The Orchestrate Refresh Measures Processes scheduled process lets you update the plan data for collected planning measures without running the plan.

You can refresh a subset of predefined or user-defined measures such as shipments and bookings history, sales and marketing forecasts, and financial measures such as Budget Value and Financial Forecast Value. This scheduled process retains the measure data for statistical and simulation demand forecasts usually purged when running your plan. By defining a job set, you can automate this scheduled process to refresh measures immediately after loading external measure data from flat files.

For example, an enterprise has a weekly demand planning cycle. They need to generate a baseline statistical forecast once a week but continue to get daily updates for recent shipments, bookings, and sales forecasts. Instead of running the plan daily, they modify their planning process to run it at the start of the week and then refresh the key collected measures daily.

Orchestrate Refresh Measures Processes

Use these steps to configure the Orchestrate Refresh Measures Processes scheduled process using a measure catalog containing only a subset of plan measures:

1. In the Scheduled Processes work area, click **Schedule New Process** on the Overview page.
2. In the Schedule New Process dialog box, search for and select **Orchestrate Refresh Measures Processes**, and then click **OK**.
3. In the Process Details dialog box, Basic Options section, do the following:
 - o **Plan:** Select a plan name.
 - o **Measure Catalog:** Select a measure catalog.
4. Click **Advanced** and navigate to the Schedule tab. You can set up the process to run as soon as possible or establish a schedule.
5. When done, click **Submit**.

The Confirmation dialog box opens and displays the process number. You can use this process number to search for the process result in the Scheduled Processes work area.

Related Topics

- [Orchestrate Refresh Measures Processes](#)

Additional Information About Orchestrate Refresh Measures Processes

Here's some additional information about the Orchestrate Refresh Measures Processes scheduled process:

- You can schedule the **Orchestrate Refresh Measures Processes** scheduled process to refresh collected measure data for one time or on a repetitive schedule from the Scheduled Processes work area. You can configure a job set that contains the **Orchestrate Refresh Measures Processes** scheduled process after the **Load Planning Data from Flat Files** scheduled process to sequence and automate these planning processes.
- When copying a plan, you get the following options:
 - Copy plan options only
 - Copy plan with reference to the base plan
 - Copy plan with no reference to the base plan

If the copied plan was created using the second option (Copy plan with reference to the base plan), then it doesn't support the Refresh Collected Measure Data capability. Such plans don't appear in the **Plan** field of the **Orchestrate Refresh Measures Processes** scheduled process.

- The **Orchestrate Refresh Measures Processes** scheduled process considers the measure data uploaded using file-based data import (FBDI) templates, including planning measures and demand history. The scheduled process doesn't consider transactional data such as sales orders, price changes, or new items and organizations that aren't already included in a plan. For supply plans, measure data loaded using the Supply Chain Planning External Forecasts import template can't be refreshed.
- If you've defined a measure with the **Refresh with current data** option on the Properties subtab on the Advanced tab in the Create Measure dialog box, after you add the measure to a plan, you must first run the plan to refresh it with the current data before you can refresh that measure's data using this scheduled process.

Note: Run your plan after a release upgrade before using this scheduled process.

- You need to include both the Shipments History (or Bookings History) measure and the default measure used to refresh shipments history in your measure catalog. For example, if the default measure used for the Default Shipments History Measure profile option is Shipments History: Requested Item by Shipped Date, then include both this measure and the Shipments History measure in the measure catalog used to refresh your plan.
- You can't use the **Orchestrate Refresh Measures Processes** scheduled process to refresh the measures in a demand plan that has a planning level profile. Such plans aren't available for selection in the **Plan** field for the scheduled process.

Related Topics

- [Orchestrate Refresh Measures Processes](#)
- [Overview of Planning Level Profiles](#)

4 Planning Analytics

Overview of Planning Analytics

Configuring planning dimensions and hierarchies on the Configure Planning Analytics page is a key setup to use the analytics in Supply Chain Planning work areas.

It has a unified dimensional hierarchy for various uses. Depending on your security privilege, you can also open the Configure Planning Analytics page from the Setup and Maintenance work area by selecting the following:

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

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

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

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

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

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

Related Topics

- [Considerations for Setting Up Dimension Catalogs](#)
- [Configure Planning Analytics](#)
- [How You Use Dimensions and Dimension Catalogs in Supply Chain Planning](#)
- [How You Use Levels and Attributes in Supply Chain Planning](#)
- [Can I modify the default dimension catalog?](#)

Configure Planning Analytics

To run plans successfully, you must set up dimensions and dimension catalogs, measure catalogs, and levels and attributes.

You can open the Configure Planning Analytics task from one of the Supply Chain Planning work areas. Depending on your security privilege, you can also open the Configure Planning Analytics page from the Setup and Maintenance work area.

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

To configure planning analytics:

1. In the Navigator, click one of the Supply Chain Planning work areas or click the Setup and Maintenance work area.
 - o If you clicked one of the Supply Chain Planning work areas, do the following:
 - i. Click the Tasks panel tab.
 - ii. In the Tasks panel drawer, click the **Configure Planning Analytics** link.
 - o If you clicked the Setup and Maintenance work area, select the following:
 - **Offering:** Supply Chain Planning
 - **Functional Area:** Supply Chain Planning Configuration
 - **Task:** Configure Planning Analytics
2. On the Configure Planning Analytics page, Dimension Catalogs tab, do the following:
 - a. Create a dimension catalog using the **Add Row** button, or duplicate the default dimension catalog using the **Duplicate** button.
 - b. Specify what hierarchies to use in the dimension catalog by moving hierarchies from the Available pane to the Selected pane.
 - c. Assign the dimension catalog to a plan that will use the set of hierarchies for analysis during the plan creation from Manage Plans.
3. Each Supply Chain Planning work area has a default measure catalog. Create a new measure catalog to add or remove measures.
 - a. Use the **Add Row** button to create a new catalog or use the **Duplicate** button to duplicate an existing catalog.
 - b. Specify the measures for the catalog by moving the measures from the Available pane to the Selected pane.
 - c. Assign the measure catalog to a plan that will use the set of measures during the plan creation from Manage Plans.

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

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

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

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

Dimension	Level	Member Identifier to Display Options
Product	Item	Item Name, Item Description, Item Name and Description, or Item Description and Name
Organization	Organization	Organization Name or Organization Code
Resource	Resource	Resource Code, Resource Name, or Resource Description
Resource	Work Center	Work Center Code, Work Center Name, or Work Center Description
Resource	Work Area	Work Area Code, Work Area Name, or Work Area Description
Resource	Organization	Organization Name or Organization Code
Time	Quarter	Quarter Name or Start Date The display name you configured on this page appears for quarter name on the Fiscal, Manufacturing, and Hybrid calendars.
Time	Month	Month Name or Start Date The display name you configured on this page appears for month name on the Fiscal, Manufacturing, and Hybrid calendars.

Tip: The organization level in the Organization dimension and the organization level in the Resource dimension are separate settings. Oracle recommends that you set them to use the same identifier.

- f. To add an attribute for the lowest level of the hierarchy, click the **Edit Page** button in the Attributes column.
 - i. In the Manage Attribute List dialog box, click the **Add Row** button.
 - ii. In the Attribute list, select an attribute.
 - iii. In the Attribute Label text box, enter a label name and click **OK**.

5. On the Configure Analytics page, click the **Save and Close** button.

Related Topics

- [How You Use Dimensions and Dimension Catalogs in Supply Chain Planning](#)
- [Considerations for Setting Up Dimension Catalogs](#)
- [How You Use Levels and Attributes in Supply Chain Planning](#)
- [Overview of Planning Analytics](#)
- [How You Use Measure Catalogs in Supply Chain Planning](#)

Dimensions and Dimension Catalogs

How You Use Dimensions and Dimension Catalogs in Supply Chain Planning

Oracle Fusion Cloud Supply Chain Planning has hierarchy levels by which you can view, compare, and analyze demands and supplies of your products over various dimensions, such as geography and organizations.

Oracle Supply Chain Planning uses a single set of dimensions and hierarchies to drive aggregation context for demand planning, supply planning, embedded analytics, and management analytics.

Oracle Supply Chain Planning provides predefined planning dimensions. Each of those dimensions has a predefined hierarchy. When you implement the Oracle Supply Chain Planning offering, you must decide which dimensions and hierarchies to use for demand and supply analysis.

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

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

The following hierarchies are predefined in Oracle Supply Chain Planning:

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

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

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

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

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

Related Topics

- [Considerations for Setting Up Dimension Catalogs](#)
- [How can I use dimensions in Supply Chain Planning?](#)
- [Overview of Planning Analytics](#)
- [What's a dimension in Supply Chain Planning?](#)
- [Why You Disable or Enable Dimensions for Supply Plan Measures](#)

Considerations for Setting Up Dimension Catalogs

Oracle Fusion Cloud Supply Chain Planning provides predefined dimensions, and those dimensions have predefined hierarchies. The predefined hierarchies are included in the Default Catalog.

Hierarchy Selections for the Customer Dimension

The default Customer hierarchy has the Customer Site, Customer, and Customer Class levels. This default hierarchy is defined in the Oracle Fusion Trading Community Model, and you can modify it there.

Hierarchy Selections for the Exception Type Dimension

The default Exception Type hierarchy has the Exception Type level.

Hierarchy Selections for the Order Type Dimension

The default Order Type hierarchy has the Order Type and Order Group levels.

Hierarchy Selections for the Organization Dimension

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

Hierarchy Selections for the Product Dimension

The default Product hierarchy has the Item, Category Level 1, and Category Level 2 levels. You can collect other catalogs for the Product dimension into Oracle Supply Chain Planning and select the resulting hierarchies.

For Oracle Sales and Operations Planning, the Lifecycle Phase attribute is also included in the default hierarchy.

The Planning catalog is populated into the Product hierarchy.

You must create the Planning catalog in the Product Information Management work area as follows:

- In the Create Catalog dialog box, in the **Functional Area** field, select **Planning**.
- In the **Controlled At** field, select **Master Level**.
- Select the **Assign items to leaf level categories only** check box.
- Don't select the **Allow multiple item category assignments** check box.
- On the Edit Catalog page, on the Details tab, in the **Default Category** field, select a default category.

On the Edit Catalog page, on the Category Hierarchy tab, you won't be able to create a hierarchy of categories. Under the root level, you will be able to create only one level of categories.

If you're using the file-based data import (FBDI) template named Supply Chain Planning Catalogs (ScpCatalogImportTemplate.xlsx), do the following:

- On the Catalogs_ tab, in the **Control Level** column, enter **1**.
- In the **Default Indicator** column, enter **Yes**.
- On the CatalogCategoryAssociation_ tab, create a hierarchy of categories if this setup meets your requirements.
- On the ItemCategories_ tab, ensure that items belong to only the lowest-level categories, and that items don't belong to multiple categories.

If you haven't set up the Planning catalog, the predefined Product hierarchy of the Product dimension is used. The predefined Product hierarchy has only one predefined item. In this situation, your items won't be available in the default Product hierarchy, and your items will be available through the other hierarchies that are created for collected catalogs.

Hierarchy Selections for the Resource Dimension

The default Resource hierarchy has the Resource, Work Center, Work Area, and Organization levels. This default hierarchy is defined in Oracle Manufacturing and you can't modify it.

Hierarchy Selections for the Source Dimension

The default Source hierarchy has the Source level.

Hierarchy Selections for the Supplier Dimension

The default Supplier hierarchy has the Supplier Site and Supplier levels.

Hierarchy Selections for the Time Dimension

The Gregorian Calendar hierarchy has the Day, Month, Quarter, and Year levels. You can collect other hierarchies for the Time dimension into Oracle Supply Chain Planning and select them. These hierarchies include workday calendars of inventory organizations collected from Oracle Fusion Cloud SCM and fiscal calendars collected from Oracle Fusion Cloud Financial Management.

Related Topics

- [How You Use Dimensions and Dimension Catalogs in Supply Chain Planning](#)
- [How can I use dimensions in Supply Chain Planning?](#)
- [Can I modify the default dimension catalog?](#)
- [Overview of Planning Analytics](#)
- [Why You Disable or Enable Dimensions for Supply Plan Measures](#)

What's a dimension in Supply Chain Planning?

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

Related Topics

- [Configure Planning Analytics](#)
- [How can I use dimensions in Supply Chain Planning?](#)
- [How You Use Dimensions and Dimension Catalogs in Supply Chain Planning](#)
- [Considerations for Setting Up Dimension Catalogs](#)

How can I use dimensions in Supply Chain Planning?

Oracle Fusion Cloud Supply Chain Planning applications come with predefined hierarchies in the Product dimension.

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

Related Topics

- [How You Use Dimensions and Dimension Catalogs in Supply Chain Planning](#)
- [Considerations for Setting Up Dimension Catalogs](#)
- [What's a dimension in Supply Chain Planning?](#)

What's a dimension catalog in Supply Chain Planning?

In Oracle Fusion Cloud Supply Chain Planning, a dimension catalog is a selected list of dimensions enabled for use in plans.

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

Related Topics

- [Can I modify the default dimension catalog?](#)
- [What's a dimension in Supply Chain Planning?](#)
- [Considerations for Setting Up Dimension Catalogs](#)
- [How You Use Dimensions and Dimension Catalogs in Supply Chain Planning](#)

Can I modify the default dimension catalog?

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

Related Topics

- [How You Use Dimensions and Dimension Catalogs in Supply Chain Planning](#)
- [Considerations for Setting Up Dimension Catalogs](#)
- [What's a dimension catalog in Supply Chain Planning?](#)

Measure Catalogs

How You Use Measure Catalogs in Supply Chain Planning

The measure catalog is similar to the dimension catalog.

Each measure catalog has a collection of measures that you can use in plans in one of the Oracle Fusion Cloud Supply Chain Planning work areas. The measure catalog can contain predefined and user-defined measures.

On the Measure Catalogs tab on the Configure Planning Analytics page, you can create a measure catalog and add or remove measures from a measure catalog.

Note: In the **Status** column, the count indicates only those plans that include the measure catalog on the Scope tab on the Plan Options page. The count doesn't indicate the plans in which the measure catalog is used for archiving the plans or extracting them.

This table lists some predefined measure catalogs for Oracle Supply Chain Planning:

Work Area	Predefined Measure Catalogs
Demand and Supply Planning	<ul style="list-style-type: none"> • Default Demand and Supply Catalog • Default Demand Management Catalog • Default Supply Planning Catalog • Supersession Forecasting Catalog
Demand Management	<ul style="list-style-type: none"> • Default Demand Management Catalog • Supersession Forecasting Catalog
Planning Central	<ul style="list-style-type: none"> • Default Demand and Supply Catalog • Default Demand Management Catalog • Default Planning Central Catalog • Default Supply Planning Catalog
Replenishment Planning	<ul style="list-style-type: none"> • Default Replenishment Planning Archive Catalog • Default Replenishment Planning Catalog • Incremental Replenishment Planning Default Catalog • Supersession Forecasting Catalog
Sales and Operations Planning	<ul style="list-style-type: none"> • Default S&OP Archive Catalog • Default S&OP Catalog
Supply Planning	Default Supply Planning Catalog

Related Topics

- [Can I modify the default measure catalog?](#)

Can I modify the default measure catalog?

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

Related Topics

- [How You Use Measure Catalogs in Supply Chain Planning](#)

Levels and Attributes

How You Use Levels and Attributes in Supply Chain Planning

On the Levels and Attributes tab, you can enable certain item attributes (standard fields or flexfields) and organization attributes (standard fields) to be available in Planning Analytics as filters.

For example, you can enable PLANNER_CODE to use in an analysis to group metrics and measures by that particular attribute.

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

Displaying Descriptions in Tables and Graphs

You can analyze planning data in planning tables and graphs by using the description fields of selected entities in hierarchies, such as items and organizations. You can use the description fields when their primary identifier is a difficult to understand alphanumeric code.

For each dimension level (Item, Organization, Resource, Work Center, or Work Area) you can select only one member identifier option to display in a planning table or graph. To see a list of the Member Identifier to Display options, refer to the Configure Planning Analytics topic in this guide.

Tip: The organization level in the Organization dimension and the organization level in the Resource dimension are separate settings. Oracle recommends that you set them to use the same identifier.

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

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

Related Topics

- [Overview of Planning Analytics](#)
- [Configure Planning Analytics](#)

User-Defined Hierarchies

Overview of User-Defined Hierarchies

You can create and update user-defined hierarchies for your demand, demand and supply, sales and operations, or supply plan using the file-based data import (FBDI) template named Supply Chain Planning User-Defined Hierarchy (ScpUser-DefinedHierarchyImportTemplate.xlsm).

You can do the following using the import template:

- Create a user-defined hierarchy for these dimensions:
 - Customer
 - Demand Class
 - End Demand Organization
 - End Demand Product
 - Organization
 - Product
 - Resource
 - Sales Organization
 - Supplier
- Add members to or remove members from an existing level in the user-defined hierarchy.
- Modify the user-defined hierarchy by adding or deleting levels.
- Delete the user-defined hierarchy.

Note: After creating your user-defined hierarchy, you can't rename its levels and level members. If the hierarchy is configured in a planning level profile with the Enabled or Ready status, you can't change the structure of the hierarchy or delete it.

Related Topics

- [Create a User-Defined Hierarchy](#)
- [Add or Remove Members](#)
- [Add or Delete Levels](#)
- [Delete a User-Defined Hierarchy](#)
- [Overview of Planning Level Profiles](#)

Create a User-Defined Hierarchy

You can't create a user-defined hierarchy with only the lowest level.

To create the user-defined hierarchy, do these steps:

1. In the Supply Chain Planning User-Defined Hierarchy import template (ScpUser-DefinedHierarchyImportTemplate.xmlsm), enter the structure of the user-defined hierarchy on the User-DefinedHierarchyMaster_ worksheet.

The lowest level for each supported dimension is LEVEL_0, and the name for this level is predefined and can't be changed. The highest-possible level is LEVEL_10.

If the hierarchy is for the Product dimension, you can enter **Yes** in the **Default Indicator** column to enable the hierarchy by default in the Selector Tool.

2. Enter the details of the level members on the User-DefinedHierarchyDetail_ worksheet.
3. Generate the .csv files for the import template, and compress them into a single file.
4. Click **Navigator > Tools > File Import and Export**, and import the compressed file.
5. In the Scheduled Processes work area, run the **Load Planning Data from Flat Files** scheduled process.
 - a. In the Process Details dialog box, in **Source System**, select the source system.
 - b. In **Collection Type**, select **Net change**.
 - c. In **Data File**, select the compressed file.
 - d. Ignore the fields for organization group collection because this functionality isn't relevant to user-defined hierarchies.
6. Click **Submit**.

The user-defined hierarchy is created.
7. Add the user-defined hierarchy to the dimension catalog that's used by your plan.

Note: If you've created your demand, demand and supply, or supply plan in the Planning Central work area, add the hierarchy to the Default Catalog, which is the only dimension catalog that can be used in plans that are created in this work area.

8. Run your plan with the **Refresh with current data** option selected on the Parameters tab in the Run Plan dialog box. Select other options as required.
9. Modify your selections on the Hierarchies and Members tabs in the Selector Tool for the affected tables and graphs.

Related Topics

- [Overview of User-Defined Hierarchies](#)
- [Overview of Tables, Graphs, Analysis Sets, Tiles, and Tile Sets](#)

Add or Remove Members

You can add members to or remove members from any level of your user-defined hierarchy.

Note these points about adding members to or deleting members from your user-defined hierarchy:

- At the lowest level (LEVEL_0), you can add only those members that have already been collected from Oracle Fusion Cloud Applications or your third-party source system. When you delete members at the lowest level of

your user-defined hierarchy, the deletion is restricted to the user-defined hierarchy, and the members continue to exist in your source system.

If you're only adding or deleting members at Level_0, you must run the **Load Planning Data from Flat Files** scheduled process in the Net change mode.

In the Supply Chain Planning User-Defined Hierarchy import template (ScpUser-DefinedHierarchyImportTemplate.xlsm), you don't need to enter anything on the User-DefinedHierarchyMaster_ worksheet or generate the .csv file for this worksheet. On the User-DefinedHierarchyDetail_ worksheet, you can enter **Yes** in the **Delete Indicator** column for the members you're going to delete.

- If you're only adding members to an intermediate level or the top level of your user-defined hierarchy, you must run the **Load Planning Data from Flat Files** scheduled process in the Net change mode.

In the Supply Chain Planning User-Defined Hierarchy import template, you don't need to enter anything on the User-DefinedHierarchyMaster_ worksheet or generate the .csv file for this worksheet. On the User-DefinedHierarchyDetail_ worksheet, you need to enter only the details for the new members. If required, for the new members at intermediate levels, you can also enter child members at lower levels.

- If you're only deleting members from an intermediate level or the top level of your user-defined hierarchy, you must run the **Load Planning Data from Flat Files** scheduled process in the Targeted mode. Effectively, you're going to delete and recreate the user-defined hierarchy.

In the Supply Chain Planning User-Defined Hierarchy import template, you must enter all the levels on the User-DefinedHierarchyMaster_ worksheet and all the level members on the User-DefinedHierarchyDetail_ worksheet and generate the .csv files for both worksheets.

You must also delete all members for which you're deleting the parent member. Otherwise, you'll have orphaned members in your user-defined hierarchy. You can delete the members by not including the applicable rows on the User-DefinedHierarchyDetail_ worksheet instead of entering **Yes** in the **Delete Indicator** column.

- If your user-defined hierarchy is configured in a planning level profile, and you've used the **Load Planning Data from Flat Files** scheduled process to add or delete hierarchy members for the Customer dimension, you must manually run the **Aggregate Collected Planning Data** scheduled process. Then, you must manually run the **Create Trees for Dimensions** scheduled process in the net change mode for the Customer dimension.

To add members to or remove members from levels of the user-defined hierarchy, do these steps:

1. If you previously imported measure values using the Supply Chain Planning Measures import template (ScpMeasuresImportTemplate.xlsm) for existing members that you're going to delete, delete the measure data for these members using the same import template.

On the Measures_ worksheet, for the values that you want to delete, enter **Yes** in the **Delete Indicator** column.

2. Generate the .csv file for the import template, and compress it.
3. Click **Navigator > Tools > File Import and Export**, and import the compressed file.

4. In the Scheduled Processes work area, run the **Load Planning Data from Flat Files** scheduled process.
 - a. In the Process Details dialog box, in **Source System**, select the source system.
 - b. In **Collection Type**, select **Net change**.
 - c. In **Data File**, select the compressed file.
 - d. Ignore the fields for organization group collection because this functionality isn't relevant to user-defined hierarchies.
 - e. Click **Submit**.Data is removed for the level members that you're going to delete.
5. In the Supply Chain Planning User-Defined Hierarchy import template, enter information as required on the User-DefinedHierarchyMaster_ and User-DefinedHierarchyDetail_ worksheets.
6. Generate the .csv files for the import template, and compress them into a single file.
7. Click **Navigator > Tools > File Import and Export**, and import the compressed file.
8. In the Scheduled Processes work area, run the **Load Planning Data from Flat Files** scheduled process.
 - a. In the Process Details dialog box, in **Source System**, select the source system.
 - b. In **Collection Type**, make the required selection.
 - c. In **Data File**, select the compressed file.
 - d. Ignore the fields for organization group collection because this functionality isn't relevant to user-defined hierarchies.
 - e. Click **Submit**.The members are created or deleted.
9. Run your plan with the **Refresh with current data** option selected on the Parameters tab in the Run Plan dialog box. Select other options as required.
10. Add members to or remove members from the Selected Members pane on the Members tab in the Selector Tool for the affected tables and graphs.

Related Topics

- [Overview of User-Defined Hierarchies](#)
- [Overview of Planning Level Profiles](#)
- [Overview of Tables, Graphs, Analysis Sets, Tiles, and Tile Sets](#)

Add or Delete Levels

To change the levels of an existing user-defined hierarchy, you must delete and recreate the entire hierarchy using the Targeted collection type for the **Load Planning Data from Flat Files** scheduled process.

You can't delete the lowest level (LEVEL_0) of the user-defined hierarchy.

If the user-defined hierarchy is configured in a planning level profile with the Enabled or Ready status, you can't change the hierarchy structure.

Note: Oracle doesn't recommend deleting a level from the user-defined hierarchy if you've loaded or stored data at that level because level deletion also requires data removal.

To modify the user-defined hierarchy by adding or deleting levels, do these steps:

1. If your measures are storing data for a level that you're going to delete, delete the level data in these measures using the Supply Chain Planning Measures import template (ScpMeasuresImportTemplate.xlsm).

On the Measures_ worksheet, for the values that you want to delete, enter **Yes** in the **Delete Indicator** column.

If you previously imported measure values for an existing level that's going to move up or down in your user-defined hierarchy, you don't need to reimport measure values for that level because the IDs for the level and level members remain unchanged.

2. Generate the .csv file for the import template, and compress it.
3. Click **Navigator > Tools > File Import and Export**, and import the compressed file.
4. In the Scheduled Processes work area, run the **Load Planning Data from Flat Files** scheduled process.
 - a. In the Process Details dialog box, in **Source System**, select the source system.
 - b. In **Collection Type**, select **Net change**.
 - c. In **Data File**, select the compressed file.
 - d. Ignore the fields for organization group collection because this functionality isn't relevant to user-defined hierarchies.

5. Click **Submit**.

Measure values are deleted.

6. In the Supply Chain Planning User-Defined Hierarchy import template (ScpUser-DefinedHierarchyImportTemplate.xlsm), enter the levels that must be added or deleted on the User-DefinedHierarchyMaster_ worksheet.

Consider an example in which your user-defined hierarchy structure for the Organization dimension is Organization (LEVEL_0), District (LEVEL_1), and Region (LEVEL_2):

- o To add a level called State that's at the highest level, you should enter Organization (LEVEL_0), District (LEVEL_1), Region (LEVEL_2), and State (LEVEL_3).
- o To add a level called Borough that's in between Organization and District, you should enter Organization (LEVEL_0), Borough (LEVEL_1), District (LEVEL_2), and Region (LEVEL_3).
- o To delete the District level, you should enter Organization (LEVEL_0) and Region (LEVEL_1).

If the hierarchy is for the Product dimension, you can enter **Yes** in the **Default Indicator** column to enable the hierarchy by default in the Selector Tool.

You don't need to enter anything on the User-DefinedHierarchyDetail_ worksheet for the deleted levels. For the new and modified (existing) levels, you must enter the all the level members on the User-DefinedHierarchyDetail_ worksheet.

7. Generate the .csv files for the import template, and compress them into a single file.
8. Click **Navigator > Tools > File Import and Export**, and import the compressed file.
9. In the Scheduled Processes work area, run the **Load Planning Data from Flat Files** scheduled process.
 - a. In the Process Details dialog box, in **Source System**, select the source system.
 - b. In **Collection Type**, select **Targeted**.
 - c. In **Data File**, select the compressed file.
 - d. Ignore the fields for organization group collection because this functionality isn't relevant to user-defined hierarchies.

10. Click **Submit.**

The user-defined hierarchy is deleted and recreated.

- 11.** Using the Supply Chain Planning Measures import template, import measure values for newly added levels if you need to.
- 12.** Generate the .csv file for the import template, and compress it.
- 13.** Click **Navigator > Tools > File Import and Export**, and import the compressed file.
- 14.** In the Scheduled Processes work area, run the **Load Planning Data from Flat Files** scheduled process.
 - a.** In the Process Details dialog box, in **Source System**, select the source system.
 - b.** In **Collection Type**, select **Net change**.
 - c.** In **Data File**, select the compressed file.
 - d.** Ignore the fields for organization group collection because this functionality isn't relevant to user-defined hierarchies.
- 15.** Click **Submit**.

Measure values are populated.
- 16.** Run your plan with the **Refresh with current data** option selected on the Parameters tab in the Run Plan dialog box. Select other options as required.
- 17.** Modify your selections on the Hierarchies and Members tabs in the Selector Tool for the affected tables and graphs.

Related Topics

- [Overview of User-Defined Hierarchies](#)
- [Overview of Planning Level Profiles](#)
- [Overview of Tables, Graphs, Analysis Sets, Tiles, and Tile Sets](#)

Delete a User-Defined Hierarchy

This topic explains how you can delete a user-defined hierarchy.

Across your user-defined hierarchies, the IDs of the lowest levels and their members are the same. You can't delete the lowest levels, their members, and the measure data that's associated with these members. These members are shared across your user-defined hierarchies.

The intermediate levels and top level of your user-defined hierarchy are specific to it. These levels and their members have unique IDs and aren't shared. When you delete the user-defined hierarchy, the intermediate levels and top level and their members are deleted.

If the user-defined hierarchy is configured in a planning level profile with the Enabled or Ready status, you can't delete the hierarchy.

To delete a user-defined hierarchy, do these steps:

- 1.** If your measures are storing data for an intermediate level or the top level that you're going to delete, delete the data in these measures, and reload them at an existing level of a different user-defined hierarchy using the Supply Chain Planning Measures import template (ScpMeasuresImportTemplate.xlsx).

On the Measures_ worksheet, make the changes that you require.
- 2.** Generate the .csv file for the import template, and compress it.

3. Click **Navigator > Tools > File Import and Export**, and import the compressed file.
4. In the Scheduled Processes work area, run the **Load Planning Data from Flat Files** scheduled process.
 - a. In the Process Details dialog box, in **Source System**, select the source system.
 - b. In **Collection Type**, select **Net change**.
 - c. In **Data File**, select the compressed file.
 - d. Ignore the fields for organization group collection because this functionality isn't relevant to user-defined hierarchies.
5. Click **Submit**.

Measure values are deleted or populated.
6. In the Supply Chain Planning User-Defined Hierarchy import template (ScpUser-DefinedHierarchyImportTemplate.xlsm), on the User-DefinedHierarchyMaster_ worksheet, enter the name and level names of the user-defined hierarchy that you want to delete.

Enter **Yes** in the **Delete Indicator** column.

You don't need to enter anything on the User-DefinedHierarchyDetail_ worksheet or generate the .csv file for this worksheet.
7. Generate the .csv file for the import template, and compress it.
8. Click **Navigator > Tools > File Import and Export**, and import the compressed file.
9. In the Scheduled Processes work area, run the **Load Planning Data from Flat Files** scheduled process.
 - a. In the Process Details dialog box, in **Source System**, select the source system.
 - b. In **Collection Type**, select **Net change**.
 - c. In **Data File**, select the compressed file.
 - d. Ignore the fields for organization group collection because this functionality isn't relevant to user-defined hierarchies.
10. Click **Submit**.

The user-defined hierarchy is deleted from dimension catalogs that it exists in.

Note: The user-defined hierarchy is still available in tables and graphs that are using it.
11. Run your plan with the **Refresh with current data** option selected on the Parameters tab in the Run Plan dialog box.

Select other options as required.

The user-defined hierarchy is removed from the tables and graphs of the plan.
12. Modify your selections on the Hierarchies and Members tabs in the Selector Tool for the affected tables and graphs.

Related Topics

- [Overview of User-Defined Hierarchies](#)
- [Overview of Planning Level Profiles](#)
- [Overview of Tables, Graphs, Analysis Sets, Tiles, and Tile Sets](#)

5 Enable Supply Chain Planning Features

How to Enable the Backlog Management Work Area

To enable the Backlog Management work area, you must perform two setup tasks.

You can perform these tasks in any order, but you must do both before a user can access the work area.

- Opt in to the Order Backlog Management feature.
- Assign a job role to the applicable users.

Opt In to the Order Backlog Management Feature

You perform this opt in one time for your overall site.

- Offering: Supply Chain Planning
- Feature: Order Backlog Management

For instructions regarding how to opt in to features, refer to the Using Functional Setup Manager guide, Offering Configuration chapter, in the Oracle Help Center.

Assign the Applicable Job Role to the Applicable Users

Assign a job role that includes the Monitor Backlog Management Work Area (MSC_MONITOR_BACKLOG_MANAGEMENT_WORK_AREA_PRIV) privilege to the user associated with each of your order backlog managers.

Other privileges you might also need to include in the job role:

- Create Backlog Plan (MSC_CREATE_BACKLOG_PLAN_PRIV)
- Manage Allocation Data (MSC_MANAGE_ALLOCATION_DATA_PRIV)
- Manage Allocation Attributes (MSC_MANAGE_ALLOCATION_ATTRIBUTES_PRIV)

For more information regarding how to assign job roles to users, refer to the Securing SCM guide, Role Provisioning chapter, in the Oracle Help Center.

Related Topics

- [Overview of Configuring Offerings](#)
- [Role Provisioning and Deprovisioning](#)
- [Configure Offerings](#)

How to Enable the Production Scheduling Work Area

To enable the Production Scheduling work area, you must perform two setup tasks.

You can perform these tasks in any order, but you must do both before a user can access the work area.

- Opt in to the Production Scheduling feature
- Assign a job role to the applicable users

Opt In to the Production Scheduling Feature

You perform this opt in one time for your overall site.

- Offering: Supply Chain Planning
- Feature: Production Scheduling

For more information regarding how to opt in to features, refer to the Using Functional Setup Manager guide, Offering Configuration chapter in the Oracle Help Center.

Assign the Applicable Job Role to the Applicable Users

Assign a job role that includes the View Production Schedule (MSC_VIEW_PRODUCTION_SCHEDULE_PRIV) privilege to the user associated with each of your production schedulers.

For more information regarding how to assign job roles to users, refer to the Securing SCM guide, Role Provisioning chapter in the Oracle Help Center.

Related Topics

- [Role Provisioning and Deprovisioning](#)
- [Overview of Configuring Offerings](#)

How to Enable the Replenishment Planning Work Area

To enable the Replenishment Planning work area, you must perform two setup tasks.

You can perform these tasks in any order, but you must do both before a user can access the work area.

- Opt in to the Replenishment Planning feature
- Assign a job role to the applicable users

Opt In to the Replenishment Planning Feature

You perform this opt in one time for your overall site.

- Offering: Supply Chain Planning

- Feature: Replenishment Planning

For more information regarding how to opt in to features, refer to the Using Functional Setup Manager guide, Offering Configuration chapter in the Oracle Help Center.

Assign the Applicable Job Role to the Applicable Users

Assign a job role to the user associated with each of your replenishment planners that includes these privileges:

- Monitor Replenishment Planning Work Area (MSC_MONITOR_REPLENISHMENT_PLANNING_WORK_AREA_PRIV)
- Manage Segments (MSC_MANAGE_SEGMENTS_PRIV)

For more information regarding how to assign job roles to users, refer to the Securing SCM guide, Role Provisioning chapter in the Oracle Help Center.

Related Topics

- [Role Provisioning and Deprovisioning](#)
- [Overview of Configuring Offerings](#)

How to Enable Project-Specific Supply Planning

How you enable project-specific supply planning depends on which scenario is applicable to your enterprise:

Scenario	How to Enable
Your enterprise uses Oracle Supply Chain Execution Cloud and has already opted in to the Project-Driven Supply Chain feature.	Use one of the two offerings: <ul style="list-style-type: none"> • Manufacturing and Supply Chain Materials Management • Supply Chain Planning Feature to enable: Plan Project-Specific Supply
Your enterprise uses Oracle Supply Chain Execution Cloud and hasn't opted in to the Project-Driven Supply Chain feature.	Use one of the two offerings: <ul style="list-style-type: none"> • Manufacturing and Supply Chain Materials Management • Supply Chain Planning Features to enable: <ul style="list-style-type: none"> • Project-Driven Supply Chain • Plan Project-Specific Supply <p>Note: Perform the setups that are required for the Project-Driven Supply Chain feature. For details, refer to the Project-Driven Supply Chain chapter in the Implementing Manufacturing and Supply Chain Materials Management guide.</p>

Scenario	How to Enable
Your enterprise doesn't use Oracle Supply Chain Execution Cloud.	Use the offering: Supply Chain Planning Features to enable: <ul style="list-style-type: none">• Project-Driven Supply Chain• Plan Project-Specific Supply

For detailed instructions on how to enable a feature, refer to the Configure Offerings topic in the Using Functional Setup Manager guide.

Related Topics

- [Configure Offerings](#)
- [How You Set Up Project-Driven Supply Chain](#)