

# Oracle Fusion Cloud SCM

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**Using Demand Collaboration**

24C



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Using Demand Collaboration

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Author: Amrut Rao

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# Get Help

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# 1 Demand Collaboration Overview

## Why You Use Demand Collaboration

You use Oracle Demand Collaboration to collaboratively assess and support demand forecast and demand consumption at a customer location. You participate in this process as a customer user or an enterprise user.

- As a customer user, you participate in demand collaboration by uploading demand, reviewing forecast and consumption analytics, and updating forecast and consumption data at your location.
- As an enterprise user, you participate in demand collaboration by reviewing forecast and consumption data updated by customers, and synchronizing that data with your enterprise demand planning processes to generate a supply forecast.

## Find the Demand Collaboration Work Area

You can find the Demand Collaboration work area using the navigator or the springboard.

- Using the navigator, expand the **Supply Chain Planning** section and click **Demand Collaboration**.
- Using the springboard carousel, find the **Supply Chain Planning tab** and click the **Demand Collaboration** tile.

**Note:** An enterprise administrator needs to have enabled the work area and assigned you a job role that lets you manage data in this work area.





# 2 Collaboration Cycles and Data Flows

## Cycles and Data Flows Overview

Demand collaboration involves demand forecasting and demand consumption. In a forecast cycle, demand for supply units or order units is uploaded, reviewed, and updated. In a consumption cycle, demand consumption history is reviewed and updated. As a customer or enterprise participant, you participate in both, the forecast cycle and consumption cycle.

## Forecast Cycle Processes

Here's the sequence of demand forecast cycle processes:

1. The customer participant uploads new or updated order forecast demand to the Demand Collaboration application.
2. The enterprise participant reviews the uploaded order forecast demand.
3. An enterprise-scheduled process sends customer demand to the demand management application.
4. An enterprise demand planner factors the customer demand into the demand planning decision process.
5. An enterprise-scheduled process sends the demand plan response to the customer participant.
6. The customer participant reviews the demand plan response.
7. An enterprise-scheduled process expires the cycle data.

## Expiration Process for a Forecast Cycle

The **Expire Current Collaboration Cycle** process moves current cycle data into the previous cycle and resets collaboration analytics, indicating a new cycle for forecast data.

## Consumption Cycle Processes

Here's the sequence of demand consumption cycle processes:

1. The customer participant uploads new or updated consumption history to the demand collaboration application.
2. The enterprise participant reviews the uploaded consumption history.
3. An enterprise-scheduled process synchronizes customer demand with the demand management application.
4. An enterprise demand planner factors the consumption history into the demand planning decision process.
5. An enterprise-scheduled process starts a new cycle.

## Start Process for a Consumption Cycle

The **Start New Collaboration Cycle** process resets collaboration analytics, indicating a new cycle for history data.

## How a Demand Planner Receives and Publishes Demand Collaboration Data

Measure data arrives for demand collaboration and leaves for demand management through UI actions or scheduled processes. It's then reviewed by an enterprise demand planner and sent back to the Demand Collaboration with changes, if any. Here's how data is received and published:

- To get demand collaboration data for demand management, the **Receive Collaboration Customer Demand** scheduled process is used.
- To send updated forecast data for demand collaboration, the **Publish Planning Data for Collaboration** scheduled process is used. Alternatively, from the Demand Management work area, the **Publish for Demand Collaboration** action can be used.

# 3 Customer Demand Uploads

## Upload and Review Demand

Upload demand for collaboration from the **Customer Demand Uploads** UI. The demand collaboration process calculates analytics based on your uploaded demand data. You can manage demand uploads using the line-level actions menu. Here's how:

### Here's what to do

- Click the **About this Record** option to review identification and processing details of an upload.
- If your upload has errors, click the **View Errors** action to find out which rows in your file have incorrect data and how you might resolve them.
- Click the **Delete** action to permanently erase the uploaded demand and related upload errors. Only unprocessed demand data is deleted.

## Use the Customer Demand Data Template

Here's the flow of working with demand uploads:

1. In the **Customer Demand Uploads** UI, click the **Download Template** button.
2. In the **Download measure template** dialog box, select a predefined template type.
3. Click **Download**.
4. In the file, enter your measure data.
5. Save your file.
6. In the **Customer Demand Uploads** UI, click the **Upload** button.
7. Select the data type you're uploading.
8. Select whether the new data causes an incremental change.
9. Optionally add notes.
10. Add your file. It must be a ZIP file.
11. Click **Upload**.

## Customer Demand Attributes

These are the attributes that must be provided by the demand collaborator when uploading customer demand. The values must be valid based on the source of the data and the collaboration document type, which is specified by the description.

- Customer number: Enter a customer number that matches the customer number found in the Oracle Fusion Cloud Supply Chain Planning supply network model.
- Customer site: Enter a customer site that matches the customer site in the Oracle Fusion Cloud Supply Chain Planning supply network model.

**Note:** Only valid if the document type is defined at the customer site level.

- Item: Enter an item number that matches the item number in the Oracle Fusion Cloud Supply Chain Planning plan inputs.
- Organization: Enter an organization code that matches the organization code in the Oracle Fusion Cloud Supply Chain Planning supply network model.
- Measure code: Enter one of the following measure codes based on the document type selected, **ORDER\_FORECAST**, **SUPPLY\_FORECAST**, or **HISTORY**.
- Quantity: Enter a quantity in the item's primary unit of measure.
- Date (DD/MM/YYYY): Enter a date in the user's date format preference.
- UOM(Unit of Measure): Enter the preferred collaboration unit of measure.

# 4 Collaboration Analytics

## Monitor Collaboration Processes Using Analytics

Track the progress of key demand collaboration processes using analytics in the **Demand Collaboration Overview** UI. The progress is expressed in percentages. The analytics you review depend on your participant type:

- If you're a customer or enterprise participant, you review the percentage of forecast received, the percentage of consumption history received, and the percentage of successful demand uploads.
- If you're an enterprise participant, then because you synchronize customer demand data with the Demand Management application, you also review the percentage of order forecasts and the percentage of history synchronized for demand management.

## Forecast Receipt Status

To track the arrival of forecast measure data for demand collaboration, click the **Forecast received** card. This opens the **Forecast receipt status** graph. Here are your data review points:

- In the card, the **Forecast received** value is the percentage of forecast data that's available for demand collaboration in the current forecast cycle
  - The **Complete** status displays when all forecast header data has been received for existing collaboration document data
  - The **On track** status displays when forecast header data for at least one document hasn't been received
- In the graph, the **Received** and **Expected** bars depict the receipt status by customer. Click a bar to view order forecast details for a customer.

## Consumption History Receipt Status

To track the arrival of consumption measure data for demand collaboration, click the **Consumption received** card. This opens the **Consumption history receipt status** graph. Here are your data review points:

- In the card, the **Consumption received** value is the percentage of consumption data that's available for demand collaboration in the current consumption cycle
  - The **Complete** status displays when all forecast header data has been received for existing collaboration document data.
  - The **On track** status displays when forecast header data for at least one document hasn't been received.
- In the graph, the **Received** and **Expected** bars depict the receipt status by customer. Click a bar to view order consumption details for a customer.

## File Upload Status

To track the progress of customer demand uploads for demand collaboration, click the **Uploads successful** card. This opens the **File upload status** graph. Here are your data review points:

- In the card, the **Uploads successful** value is the percentage of customer demand files that uploaded successfully in the last 30 days.
  - The **Complete** status displays when all uploads were successful or are in process without issues.
  - The **Action required** status displays when at least one file upload isn't in process or has errored out.
- In the graph, the **Success**, **Partial success**, and **Error** bars depict the upload status by measure type. Click a bar to view demand uploads for that status and measure type.

## Order Forecast Synchronization Status

To track the synchronization of collaboration forecast data for demand management, click the **Order forecasts synced** card. This opens the **Order forecast sync status** graph. Here are your data review points:

- The **Order forecasts synced** value is the percentage of forecast measure data that was collaborated on and synced for demand management in the current forecast cycle.
  - The **Complete** status displays when all of the forecast data has been synced for demand management.
  - The **Action required** status displays when the sync process has errored out.
- In the graph, the **Synced**, **Ready (to Sync)** and **Error** bars depict the sync status by customer. Click a graph to view forecast details for a customer.

## Consumption History Synchronization Status

To track the synchronization of collaboration consumption data for demand management, click the **History synced** card. This opens the **Consumption history sync status** graph. Here are your data review points:

- The **History synced** value is the percentage of consumption measure data that was collaborated on and synced for demand management in the current consumption cycle.
  - The **Complete** status displays when all of the consumption data has been synced for demand management.
  - The **Action required** status displays when the sync process has errored out
- In the graph, the **Synced**, **Ready (to Sync)** and **Error** bars depict the sync status by customer. Click a graph to view consumption details for a customer.

# 5 Collaboration Data Management

## Manage Collaboration Data for Customer Demand

Find, review, and update collaboration data for demand documents using the **Demand Collaboration Details** UI. Here's an overview of collaboration data review and update tasks:

1. Switch between demand forecast and demand consumption data.
2. Find a record or a set of records using keywords or search filter chips. You can filter by organization, customer, customer site, and synchronization status.
3. Review attribute data for each record and use the column selector to select attributes you want displayed.
4. To view header and measure data for a record, click the **About this document** option for a record.
5. Edit a selection of collaboration documents.
6. Download a selection of collaboration documents.
7. Delete a selection of collaboration documents.
8. Synchronize collaboration data for demand management.

## Collaboration Attributes

Demand documents comprise attributes that are common to both Forecast and Consumption measure types and that are type-specific. Here's the list of common attributes:

- Customer
- Customer number
- Customer site
- Customer site location
- Item
- Item description
- Organization (code)
- Organization name
- Date updated

The forecast-specific attributes are Supply Forecast and Order Forecast, and the consumption-specific attribute is History.

## Forecast-Specific Attributes and Statuses

The forecast-specific attributes are Supply Forecast and Order Forecast. Here's how you review them:

- The **Supply Forecast** column lists the number of forecasted supply units for a demand document. The **Order Forecast** column lists the number of forecasted orders for a demand document.

- The status icon indicates whether the data for a measure is ready to sync, pending sync, out of sync, or synced.

## Consumption-Specific Attributes and Statuses

The forecast-specific attributes are Supply Forecast and Order Forecast. Here's how you review them:

- The **History** column lists the number of supply units consumed for a demand document.
- The status icon indicates whether the consumption history is ready to sync, pending sync, or synced.

## Review and Update Forecast Data

To review and update forecast measure data in a document record, click the **Edit** action on that record.

- You can compare the current and previous cycle's forecast measure data.
- You can update forecast numbers for each time bucket for the current cycle within the defined time fence boundaries.

## Review and Update Consumption Data

To review and update forecast measure data in a document record, click the **Edit** action on that record. You can update consumption numbers for each time bucket for the current cycle within the defined time fence boundaries.

## Synchronize Forecast Data for Demand Management

1. In the Collaboration Details UI, click the **Sync for Demand Management** button.
2. In the Sync for Demand Management UI, select a profile.
3. Review the source system, demand plan, demand measure, collaboration document name, and document measure.
4. Click **Sync**.



# 6 Demand Collaboration Administration

## Administration Tasks for Demand Collaboration

If you are an enterprise administrator for Demand Collaboration, you enable the work area, manage demand collaborators and update collaboration document definitions.

### Enable the Demand Collaboration Work Area

If you are an application administrator, you can enable the Demand Collaboration work area. To enable the work area, take these steps:

1. Navigate to the Setup and Maintenance work area.
2. In Setup, select the **Manufacturing and Supply Chain Materials Management** offering.
3. Click **Change Feature Opt-In**.
4. In the Supply Chain Collaboration row, click the **Edit Feature** icon.
5. In the **Edit Features UI**, enable the Customer Demand Collaboration feature.
6. Click **Done**.

### Assign Roles and Privileges to Users

If you are an application administrator, you need to grant users roles that will allow them to be listed as potential customer or enterprise collaborators in the Demand Collaboration work area. Refer to the Securing SCM guide and the Security Reference for Manufacturing and Supply Chain Materials Management for security procedures and security role listings.

### Add a Customer Collaborator

If you are an application administrator, you can add users as customer collaborators at your enterprise. For a user to access the Demand Collaboration work area as a customer collaborator, they must be granted the predefined job role Customer Demand Planner from the Security Console work area.

1. In the Demand Collaborators UI, click **Add**.
2. Select the **Customer** participant type.
3. Select the party name for your customer participant.

4. Click **Continue**.
5. In the **User Profile** section, review the first name, last name, and email address.
6. If prompted, enter a username.
7. If prompted, enter an email address.
8. Select the profile use status.
9. In the **Document Visibility** section, add view privileges for one or both document measure types.
10. In the **Access** section, add access privileges to customer data or to customer and customer site data.
11. Click **Add** to finish.

**Results:**

The user is added as a demand collaborator. The profile will have a status of **Pending Activation** until a backend process completes. If the collaborator you added didn't have a user account before this, then the backend process will create it for them and will assign them the Customer Demand Planner role.

## Add an Enterprise Collaborator

If you are an application administrator, you can add users as enterprise collaborators at your enterprise. For a user to access the Demand Collaboration work area as an enterprise collaborator, they must be granted the predefined job role Supply Chain Collaboration Planner from the Security Console work area.

1. In the Demand Collaborators UI, click **Add**.
2. Select the **Enterprise** participant type.
3. Select the username for your enterprise participant.
4. Click **Continue**.
5. In the **User Profile** section, review the username.
6. Select the profile use status.
7. In the **Document Visibility** section, add view privileges for one or both document measure types.
8. In the **Access** section, add access privileges to customer data or to customer and customer site data.
9. Click **Add** to finish.

**Results:**

The user is added as a demand collaborator. The profile will have a status of **Pending Activation** until a backend process completes.

## Remove a Demand Collaborator

To remove users as demand collaborators at your enterprise, open a demand collaborator's profile and click **Remove**

## Update Collaboration Document Definitions

Use document definitions to control how collaboration document data is updated, deleted, calculated, and retained. Set document definitions using the Collaboration Document Definitions REST service.

## Control Demand Deletion

Define whether enterprise or customer participants can delete customer demand. A participant deletes customer demand by deleting a collaboration document in the Demand Collaboration Details UI. When a participant deletes customer demand, they erase its identity and associated measure quantities from the current and previous cycle.

## Control Demand Editing

Define whether enterprise or customer participants can edit customer demand. A participant edits customer demand by editing a measure in a collaboration document in the Demand Collaboration Details UI. If allowed to, a collaborator can create, edit, and delete measure quantities in the collaboration document.

## Control Data Retention

Define whether measure quantities from the last expired cycle should be retained as read-only quantities in a collaboration document.

## Set the Horizon

Set the collaboration horizon duration. The horizon is the number of days, weeks, or months for which measure quantities will be accepted and processed for collaboration, and is calculated from the current day. You can also specify Current Week or Current Month to accept quantities for all days within the current week or month.

## Set the Lock Fence

Set the update lock duration. The update lock is the number of days, weeks, or months for which measure quantities will be accepted and processed for collaboration, and is calculated from the start date in the Demand Collaboration Details UI.

## Set the History

Set the history duration. The history duration is the number of days, weeks, or months counted back from the current day, for which measure quantities are accepted and can be edited for collaboration.

# Define a Synchronization Profile

As an administrator, you manage synchronization profiles used by collaborators to synchronize demand collaboration data with the demand management application at your enterprise. You can manage synchronization tasks from the Synchronization Profiles UI.

1. In the Synchronization Profiles UI, click **Create**.
2. On the New Synchronization Profile page, enter a name for your profile.
3. Select the activation status.
4. Select a source system.
5. Select a demand plan.

6. Select a collaboration document.
7. Select a document measure.
8. Select a demand measure.
9. Click **Create**.

To edit an existing profile, in the Synchronization Profiles UI, click the profile name, make your changes, and click **Update**.