Oracle Fusion Cloud SCM

Implementing Supply Chain Planning

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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
		• 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.xlsm), 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 Oracle 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
- FulfillementLine
- 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:

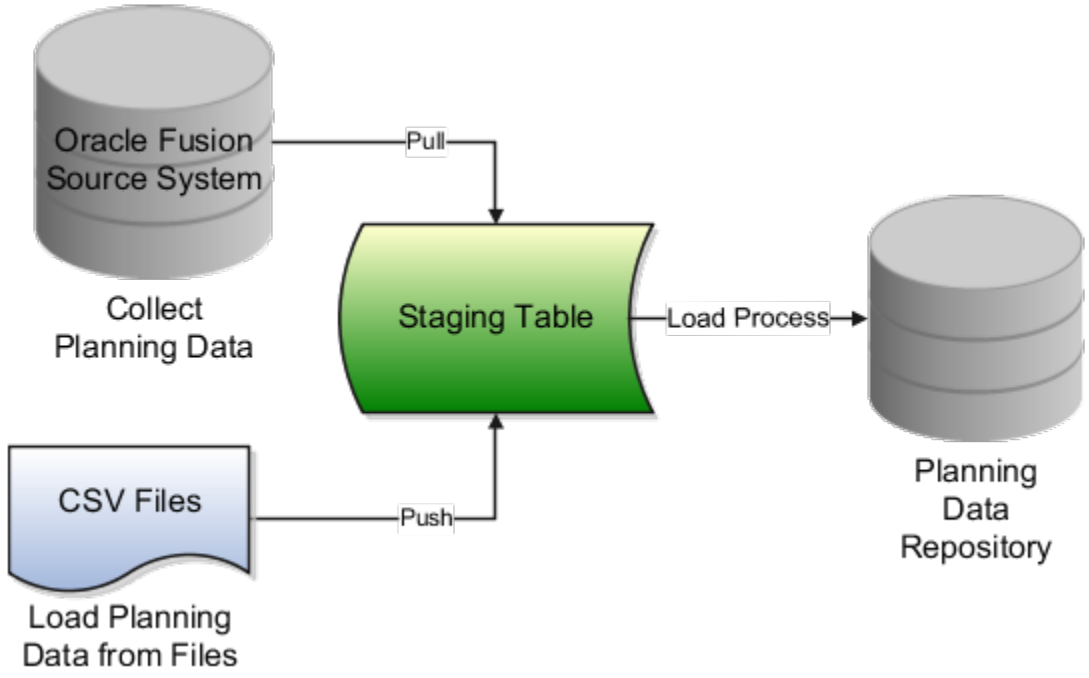
- Collect Planning Data: Use this page when you collect data from the source system for Fusion Applications.
- Load Planning Data from Flat Files: Use this scheduled process when you collect data from a completely external source system.

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.xlsm), 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.xlsm), 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 Oracle 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 might be concerned that the work definition and item structure data in your supply chain planning work area don't 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 isn't 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 with it, then you can manually add ad hoc components to it. If an item structure is associated with 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 the item structure is defined for an item. No work definition is defined.	Item structure name exists, no work definition name	The planning process collects the item structure information but doesn't collect information for routing, operations, or item resources. The planning process uses the item structure to plan components and doesn't plan resources.
Only the work definition is defined for an item. No item structure is defined.	Work definition name exists, no item structure name	The planning process collects the work definition information to populate the item structure and routing information. The planning process populates the component information and operation sequence number in the item structure based on the ad hoc components and operation assignment available in the work definition. The planning process uses the work definition information to plan both components and resources.
Both the item structure and work definition are defined for the item.	Both work definition name and item structure name exist	The planning process uses the components that are associated with the work definition to plan. The planning process doesn't consider any components of the item structure that aren't associated with the work definition. You can override the item structure component usage within the work definition. The planning process collects component attributes (such as component effectivity) from the item structure if the components are associated with the work definition. The planning process uses the work definition to plan resources.
Both the item structure and work definition are defined for the item, but the work definition doesn't refer to the item structure. Ad hoc components are assigned to the work definition operations.	Work definition name exists, no item structure name	The planning process collects the components from the work definition and not from the item structure in Oracle Fusion Cloud Product Lifecycle Management. The process plans components based on work definition operation assignments and plans resources based on the work definition.

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.xlsm) 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*.

Set Up Catalogs and Items for Collections

Guidelines for Setting Up Catalogs for Collections

This topic provides guidelines for setting up catalogs so that they can be collected for use in Oracle Fusion Cloud Supply Chain Planning.

Note these guidelines for setting up catalogs for collections:

Note: This topic provides only high-level information for setting up catalogs in the Product Information Management work area. For detailed information and requirements, see the documentation for that work area.

- Create the default Product catalog:

If You're	Then
Creating the default Product catalog in the Product Information Management work area	○ In the Create Catalog dialog box, in the **Functional Area** field, select **Planning**. Once you select **Planning** as the functional area, some settings for the default Product catalog are automatically applied. ○ 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 Functional Area Catalog page, on the Details tab, in the **Default Category** field, select a default category. On the Edit Functional Area 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.
Creating the default Product catalog using the file-based data import (FBDI) template named Supply Chain Planning Catalogs (ScpCatalogImportTemplate.xlsm)	○ 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.

After the collections process, the default Product catalog that you set up or import is populated into the default Product hierarchy of the Product dimension for Oracle Supply Chain Planning.

If you haven't set up the default Product 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.

- Create your other Product catalogs:

If You're	Then
Creating the Product catalog in the Product Information Management work area	○ In the Create Catalog dialog box, 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 Category Hierarchy tab, create a hierarchy of categories if this setup meets your requirements. You can have a maximum of 15 levels in your category hierarchy when you collect the Product catalogs that you create in the Product Information Management work area.

If You're	Then
Creating the Product catalog using the Supply Chain Planning Catalogs import template	○ On the Catalogs_ tab, in the **Control Level** column, enter **1** so that the catalog is controlled at the master level. **Note:** Oracle recommends that you import Product catalogs that are controlled at the master level. If you import organizations that are controlled at the organization level, the items must be associated with the same categories in all organizations. Otherwise, the items won't be present in the resulting hierarchies. ○ On the CatalogCategoryAssociation_ tab, create a hierarchy of categories if this setup meets your requirements.

- Ensure that your default Product catalog and other Product catalogs have this structure:
  - The catalog shouldn't have a ragged structure; the categories at a catalog level should have the same number of levels for child categories.
  - The catalog can't have any category that doesn't have child categories or items.

    Such categories are referred to as dummy categories.
  - You can assign items to only the lowest-level categories.

    For Product catalogs other than the default Product catalog, items that you assign to the top-level category or intermediate-level categories won't be present in the resulting hierarchies.
  - You can assign an item to only one category.

    Any items that you assign to multiple categories aren't collected.

Other Points for Consideration

Note these points about the creation and collection of catalogs:

- For a catalog that's created in the Product Information Management work area or imported through the Supply Chain Planning Catalogs import template, the control level specifies whether the association between an item, the catalog, and a category can be controlled at the level of a parent organization or child organization.

  When a catalog that's created in the Product Information Management work area is controlled at the master level, if you assign an item to a parent organization, the item is automatically assigned to the child organizations.
- In the Setup and Maintenance work area, for the Items functional area, on the Manage Operational Attribute Group Control page, for the Planning Method attribute of the MPS and MRP Planning attribute group, in the **Controlled At** column, when you select **Master level**, you can assign the Planning functional area to a catalog that's controlled at the master or organization level. If you select **Organization level** in the **Controlled At** column, you can assign the Planning functional area to only a catalog that's controlled at the organization level. While this catalog that you create in the Product Information Management work area won't be collected, you can create other Product catalogs that are controlled at the master level and that can be collected.
- You can't assign a functional area to more than one catalog. However, you can assign more than one functional area to a catalog.
- Once you assign the Planning functional area to a catalog, you can't remove the assignment of the functional area from the catalog and reassign the functional area to another catalog.
- You must use the Collect Planning Data page to collect the default Product catalog and other Product catalogs that you create in the Product Information Management work area.

- During collections through the Collect Planning Data page or **Load Planning Data from Flat Files** scheduled process, the **Create Trees for Dimensions** scheduled process converts catalogs into hierarchies (trees) for the Product dimension. The structure of each catalog is validated according to the previously provided list in this topic for the catalog structure when the hierarchies are created. Any catalog that fails a validation isn't converted to a hierarchy, and a warning message is logged. You can examine the log file to identify catalogs that weren't converted.

  After fixing such catalogs in the Product Information Management work area or using the Supply Chain Planning Catalogs import template, you must run collections again using the net change collection type.
- The default Product hierarchy has three levels, two levels for categories and the lowest Item level. The collected items are stored at the Item level. If you're collecting the default Product catalog, the resulting Product hierarchy must have a minimum of three levels, two levels for categories and the lowest level for items. During collections, changes will be made so that your Product hierarchy has the required structure. For example, if your default Product catalog has only one category level with the items, two more levels will be created in the Product hierarchy, and the items will be moved to the lowest level. If your default Product catalog has more than three levels, all the levels are retained in the Product hierarchy, and the items are moved to the lowest level.

  These modifications are done for the Product hierarchy whether you set up your default Product catalog in the Product Information Management work area or using the Supply Chain Planning Catalogs import template.
- After you collect your catalogs through the Collect Planning Data page or **Load Planning Data from Flat Files** scheduled process, you must open the Configure Planning Analytics page in the Plan Inputs work area or the work area for your Oracle Supply Chain Planning module. On the Dimension Catalogs tab, for the dimension catalog that's attached to your plan, you must move the hierarchies for the created catalogs from the Available Hierarchies pane to the Selected Hierarchies pane.

  The hierarchies will then be available for use in your plan.
- You can view the hierarchies for the collected catalogs using the Levels and Attributes tab on the Configure Planning Analytics page. In the **Dimension** field, select **Product**. You can filter the displayed information using the **Hierarchy** field.

Related Topics

- Guidelines for Setting Up Items for Collections
- Functional Area Catalog Rules
- Resolve Warnings About Catalogs and Categories That Weren't Processed
- Resolve the Warning About the Default Product Catalog
- Load Planning Data from Flat Files

Guidelines for Setting Up Items for Collections

This topic provides guidelines for setting up items so that they can be collected for use in Oracle Fusion Cloud Supply Chain Planning.

> **Note:** This topic provides only high-level information for setting up items in the Product Information Management work area. For detailed information and requirements, see the documentation for that work area.

Note these guidelines for setting up items for collections:

- In the Setup and Maintenance work area, for the Items functional area, search for and open the **Manage Operational Attributes Groups** task. On the Manage Operational Attribute Group Control page, for the Planning Method attribute of the MPS and MRP Planning attribute group, in the **Controlled At** column, select **Master level**. Once you set the value to the Master level, items in child organizations inherit the planning method from items in parent organizations, and you can't change the planning method for items in child organizations.

  This restriction applies to only items that you create in the Product Information Management work area.
- For every item in a parent organization, in the Product Information Management work area, on the Specifications tab on the Edit Item page, in the Item Organization section, Planning section, MPS MRP Planning section, in the **Planning Method** field, select one of these values:
  - MPS Planning
  - MRP Planning
  - Not Planned: Select this value when you want the item to be collected but not planned. This selection is meant for assemble-to-order (ATO), configure-to-order (CTO), and pick-to-order (PTO) models that don't need to be planned. In such cases, only the individual items need to be planned.

    For ATO, CTO, and PTO models, in the Item Organization section, Manufacturing section, Item Structure section, in the **Pick Components** field, select **Yes**.
  - Replenishing Planning: Select this value if the item is meant for use in Oracle Replenishment Planning after collection.
- For every item, on the Specifications tab on the Edit Item page, in the Item Organization section, Inventory section, Material Control section, in the **Inventory Item** field, select **Yes**.

If you're using the file-based data import (FBDI) template named Supply Chain Planning Items (ScpItemImportTemplate.xlsm) to import your items, for every item, on the Item_ tab, enter **Yes** in the **Inventory Item Indicator** column, and enter the allowed values in the **Planning Method** column. You might also need to enter **Yes** in the **Pick Components Indicator** column.

Other Points for Consideration

Note these points about the creation and collection of items:

- Oracle Supply Chain Planning doesn't support planning by item revisions.

  However, Oracle Fusion Cloud Product Lifecycle Management supports item revisions.
- Both Oracle Supply Chain Planning and Oracle Product Lifecycle Management don't support product families.

  For a workaround in Oracle Supply Chain Planning, follow these high-level steps:

  a. Create a catalog that mimics a planning bill.
  b. In Oracle Demand Management, forecast at the category level.
  c. In Demand Management, disaggregate the forecast to the item level.
  d. Consume the item-level forecast in other modules of Oracle Supply Chain Planning.
- On the Edit Item page, on the Specifications tab, in the Item Organization section, Planning section, General Planning section, in the **Inventory Planning Method** field, if you select a value other than **Not planned**, the item is automatically assigned to the default category for the default Product catalog. However, on the Categories tab, if you assign the item to the default category for the default Product catalog, the **Inventory Planning Method** field isn't updated.

- You must use the Collect Planning Data page to collect your items if you've set them up in the Product Information Management work area.
- You can view the collected items in the Items table for the Plan Inputs work area or your module.

Related Topics

- Guidelines for Setting Up Catalogs for Collections
- Resolve the Issue About Items Not Being Collected

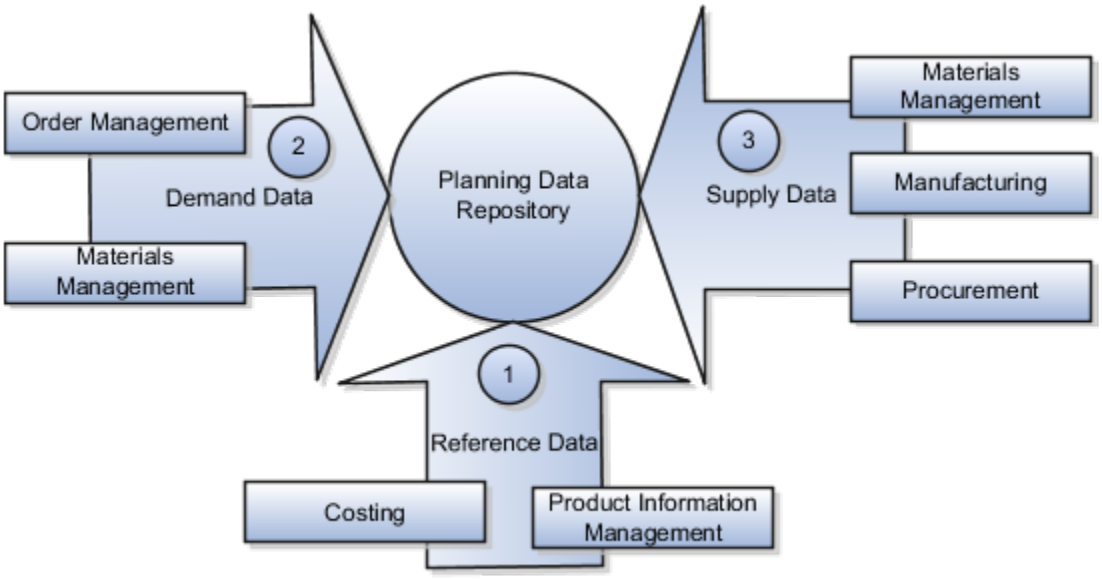
Collect Planning Data from the Oracle Fusion Source System

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, transfer orders, 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
- Import Templates Used to Create CSV Files for Oracle Supply Chain Planning
- Load Planning Data from Files

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 planning data repository used by the modules in Oracle Fusion Cloud Supply Chain Planning, run a targeted collection.

You can run the targeted collection immediately or you can schedule it for later.

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

1. Open the Collect Planning Data page.
    - If you're in one of the Supply Chain Planning work areas, do the following:
        i. Select the Tasks panel tab.
        ii. In Plan Inputs, select **Collect Planning Data**.
    - If you're 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 these steps:
    - On the Parameters tab:
        i. Select your source system.
        ii. For the collection type, select **Targeted**.

            Demand planning data can be collected only through the Targeted collection type.
        iii. Select **Select Collection Filters** to select the collection filters.
    - On the Reference Data subtab, move the required reference entities to the Selected Entities pane.
    - 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.

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

        - **Collection Time Frame Options**: You can specify a fixed or rolling date range for collecting 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 history data for the number of days that you specify. For example, if you forecast weekly, enter **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 history data by the number of days that you enter 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 on the basis of the history data of 52 weeks, select the **Roll off time periods automatically** checkbox, and enter 364 in the **Number of**

days to keep field. This setting ensures that when 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 checkbox, 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.

  Select a value in **Organization - Consumption Inventory Transactions to Include** to collect consumption inventory transactions at the organization level. You can collect transactions for transfer orders, all orders, or no orders.

  Select a value in **Subinventory - Consumption Inventory Transactions to Include** to collect consumption inventory transactions at the subinventory level. You can collect transactions for transfer orders, all orders, or no orders.

  Select the **Collect amount data for history** checkbox to collect amount data.
- **Additional Options**: Select other 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 checkboxes 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.

  Collect Receipts History: Specify whether you want to collect historical receipt transactions for organizations or subinventories. For more information, see the topic titled *Receipts-Based Forecasting*.

- On the Supply Planning Data subtab, set options as follows:

  i. Move the required supply entities to the Selected Entities pane.
  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 for collecting resource availability on the basis of a rolling time window. That rolling time window adjusts itself on the basis of the date on which 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 in a collection template for later use.

You can collect the existing data for the resource availability.

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

3. (Optional) Select the Schedule tab, and set collections to run as soon as possible or at a different time.
4. Select **Submit** to start the collections process.
5. Monitor the collection status in the Scheduled Processes work area.
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:
    - Offering: Supply Chain Planning
    - Functional Area: Supply Chain Planning Configuration
    - Task: Collect Planning Data
2. Complete the following parameters for the Collect Planning Data process:
    a. Select your source system.
    b. Select the collection type as Net change.

    > **Note:** You cannot make any changes to the filter criteria and demand planning data in the net change collection type.

    c. In the **Reference Data** tab, move the required reference entities to the Selected Entities area.
    d. In the **Supplies Planning Data** tab, move the required supply entities to the Selected Entities area.

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

Related Topics

- 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

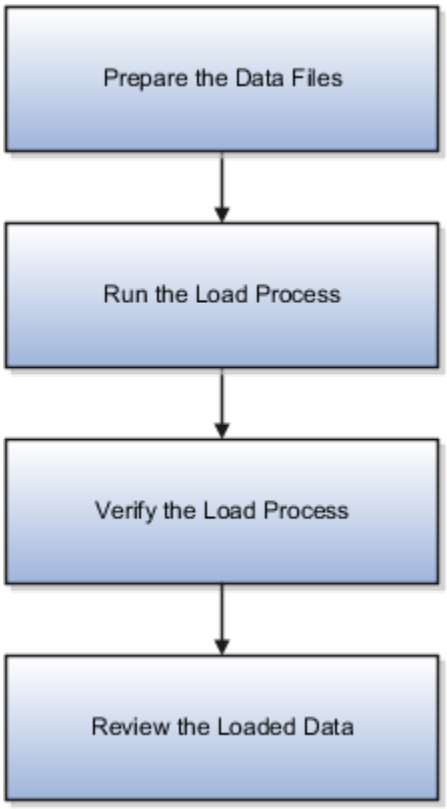
How You Load Planning Data from Files

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 Oracle Supply Chain Planning
- Verify the Load Planning Data from Files Process
- Review Data in the Planning Data Repository
- Load Planning Data from Files

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
- Load Planning Data from Files

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:

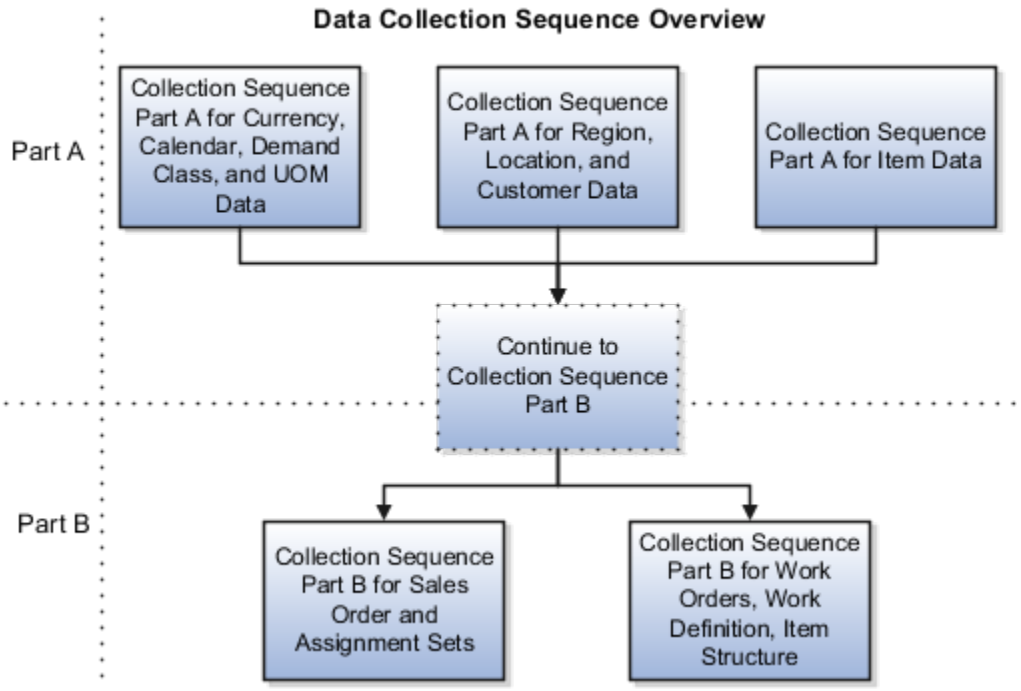
- Collections Sequence Part A for Item Data
- Collections Sequence Part A for Region, Location, and Customer Data
- Collections Sequence Part A for Currency, Calendar, Demand Class, and UOM Data

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.

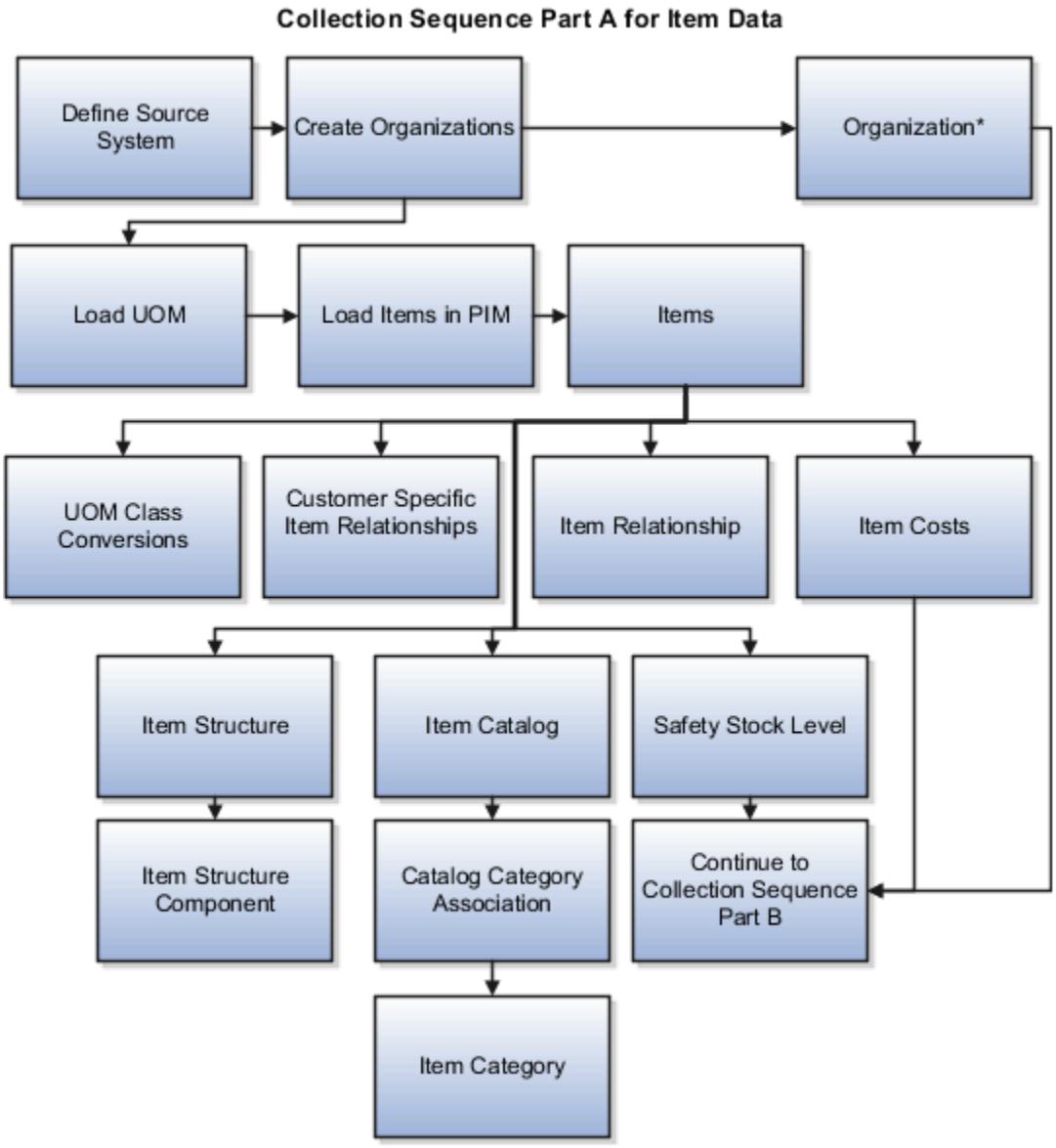
The following figure provides an overview of the data collection sequence. The overview shows how Part A and Part B fit together to form a complete data collection flow.



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.

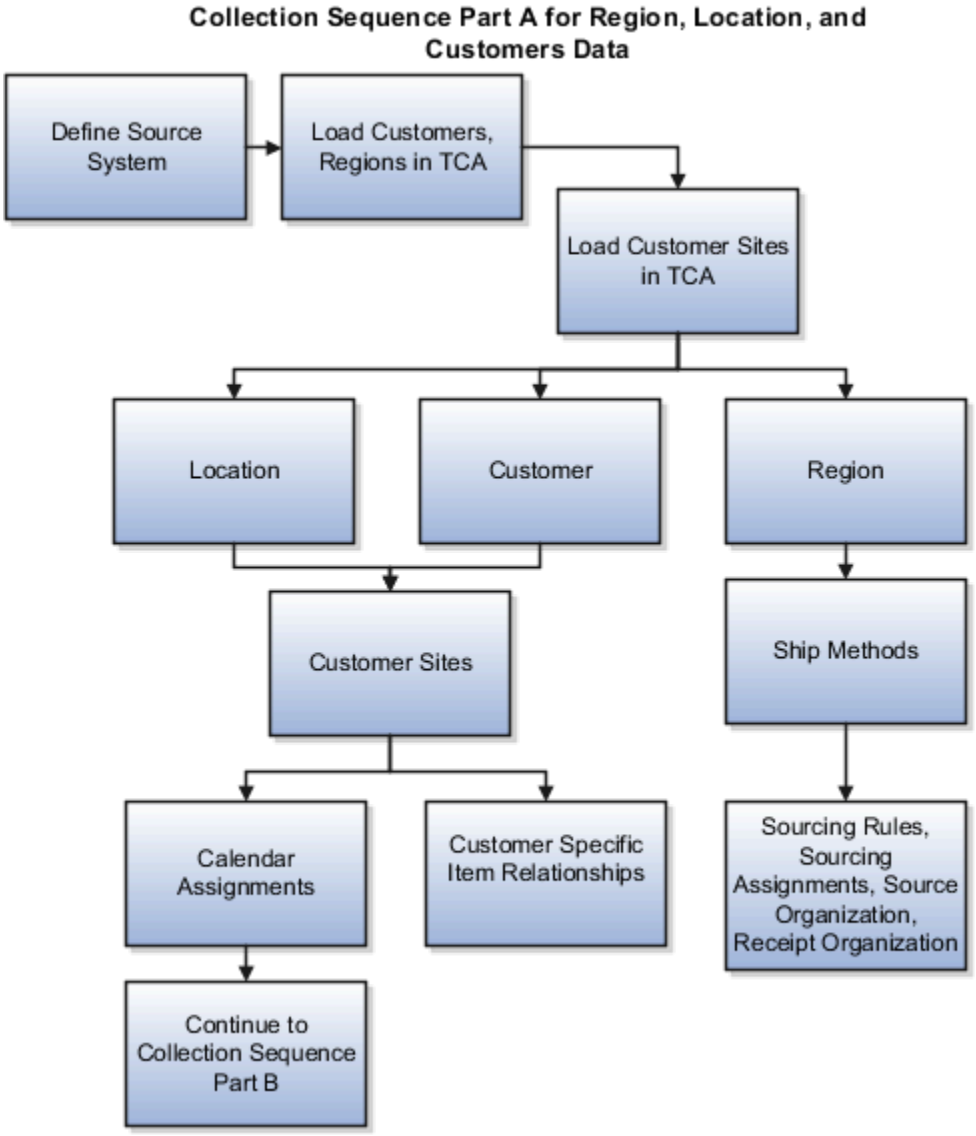


When you collect the data described here, continue to the collection sequence Part B described in the following subsections.

- 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.



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

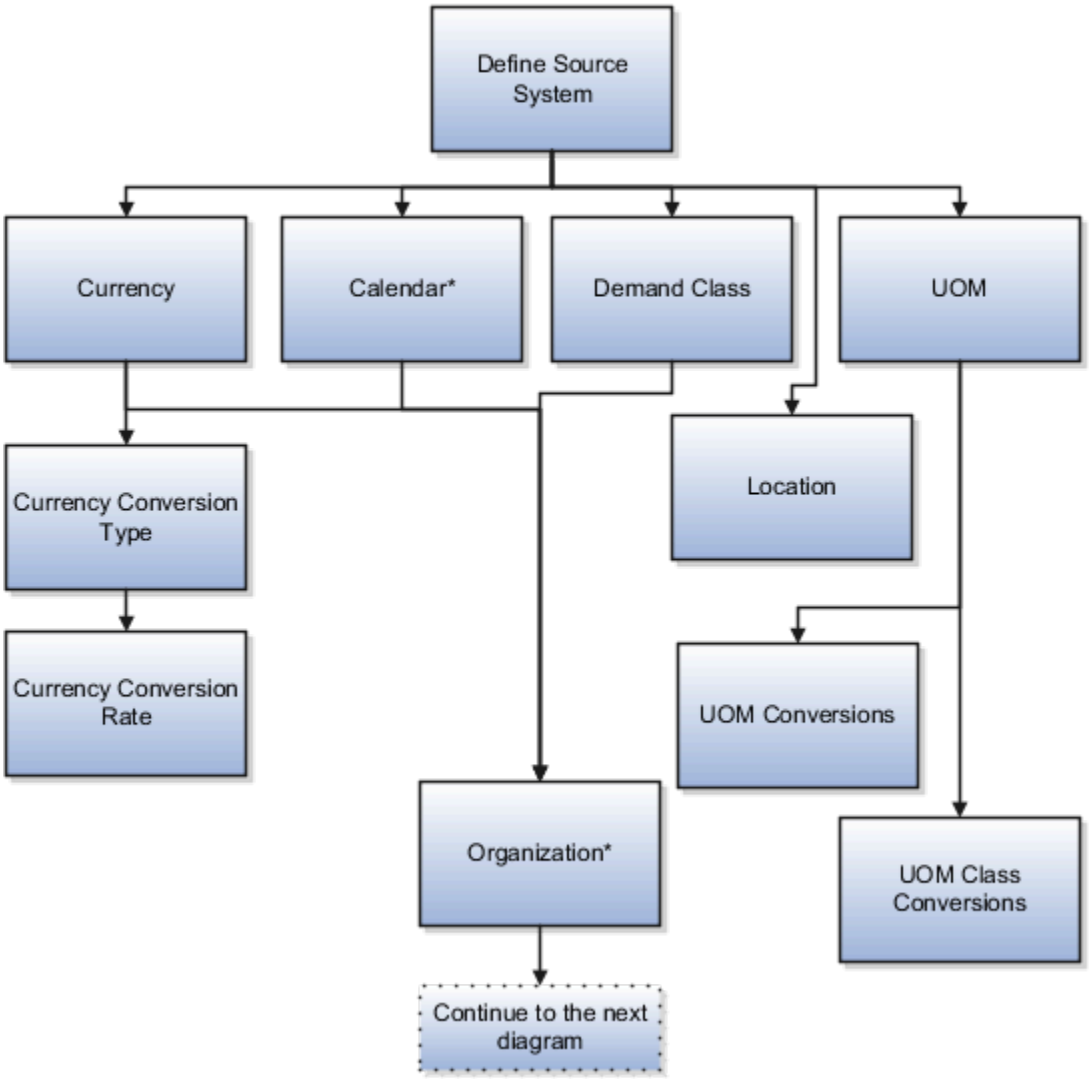
- Collection Sequence Part B for Sales and Order and Assignment Sets
- Collection Sequence Part B for Work Orders, Work Definition, and Item Structure

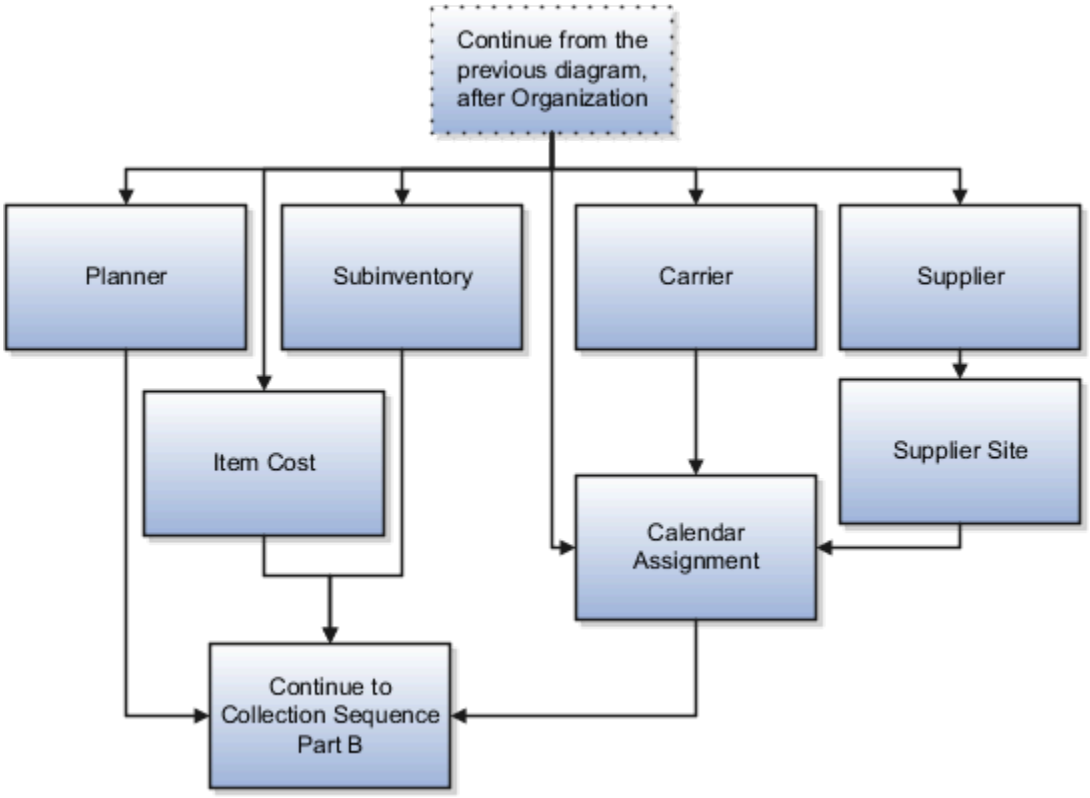
Collections Sequence Part A for Currency, Calendar, Demand Class, and UOM Data

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



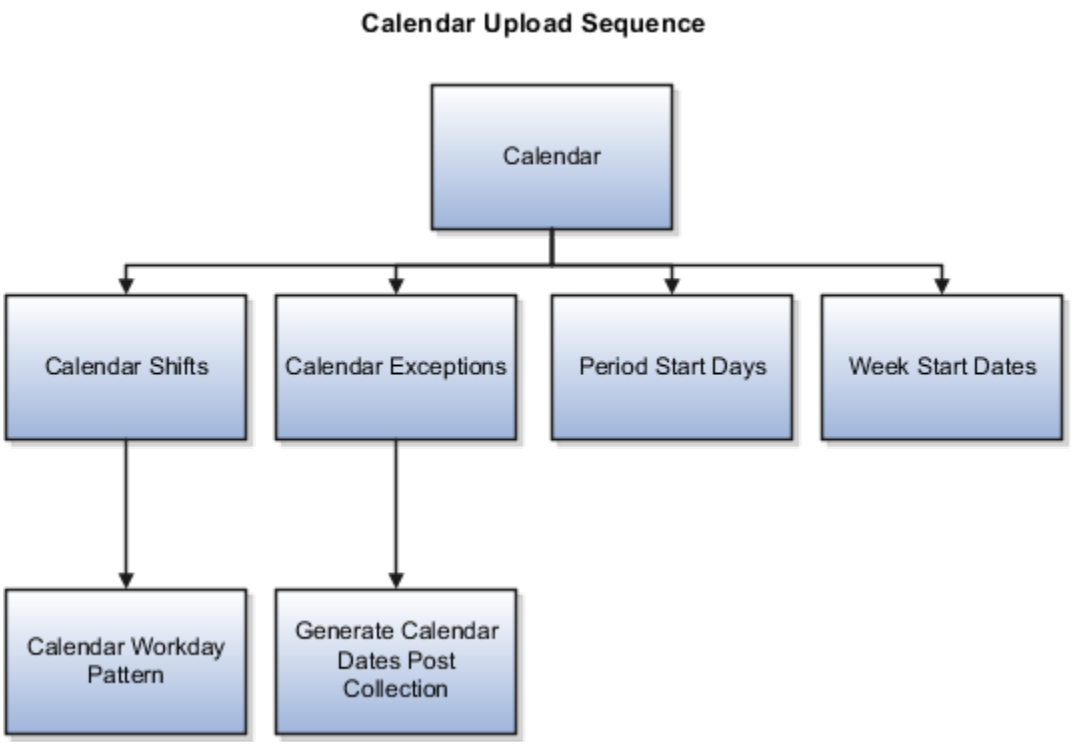


When you collect the data described here, continue to the collection sequence Part B described in the following subsections.

- 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

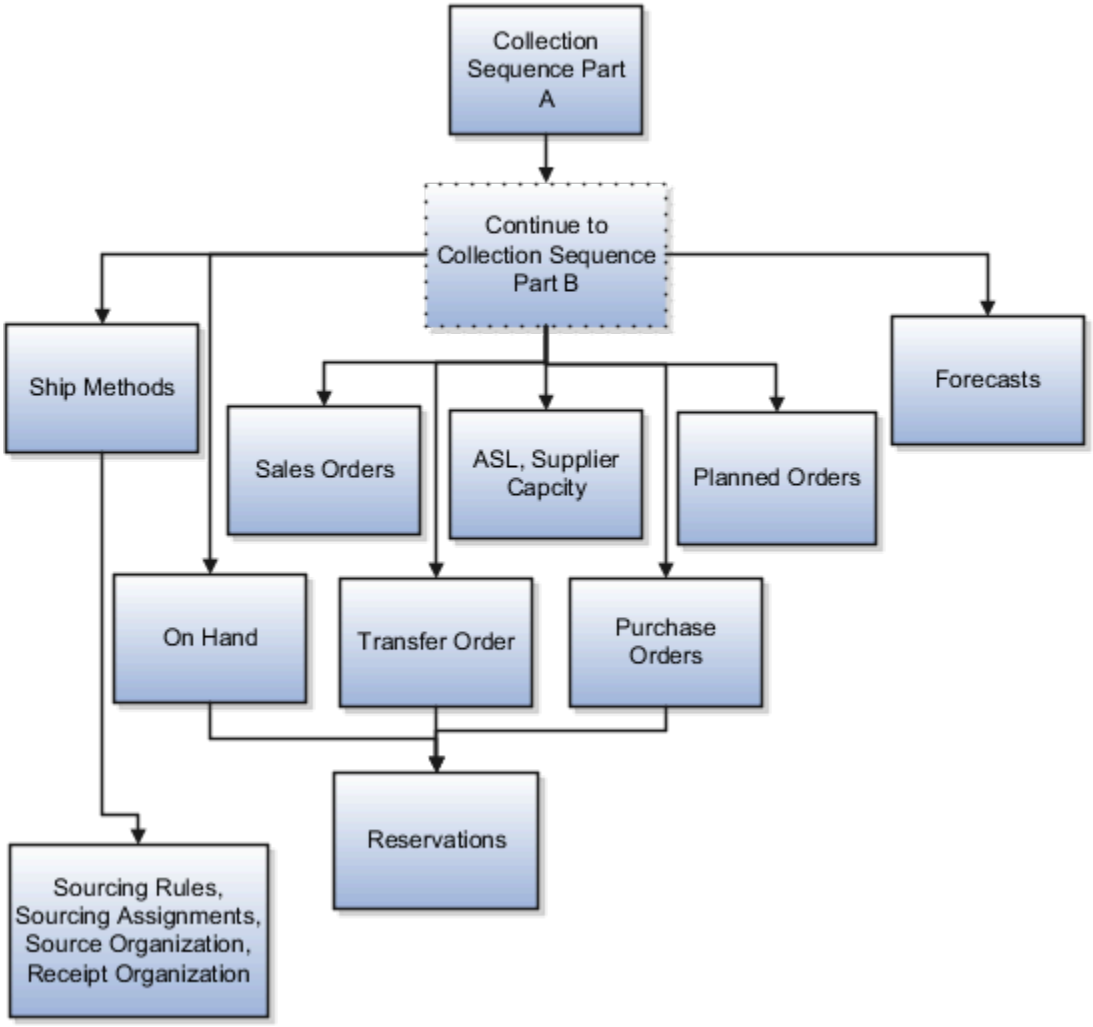
The following image shows the collections sequence to follow for collecting the Calendar data. Calendar data is a part of the data collection in Part A. You collect the Calendar data in the following subsection: Collection Sequence Part A for Currency, Calendar, Demand Class, and UOM Data.



Collections Sequence Part B for Sales Order and Assignment Sets

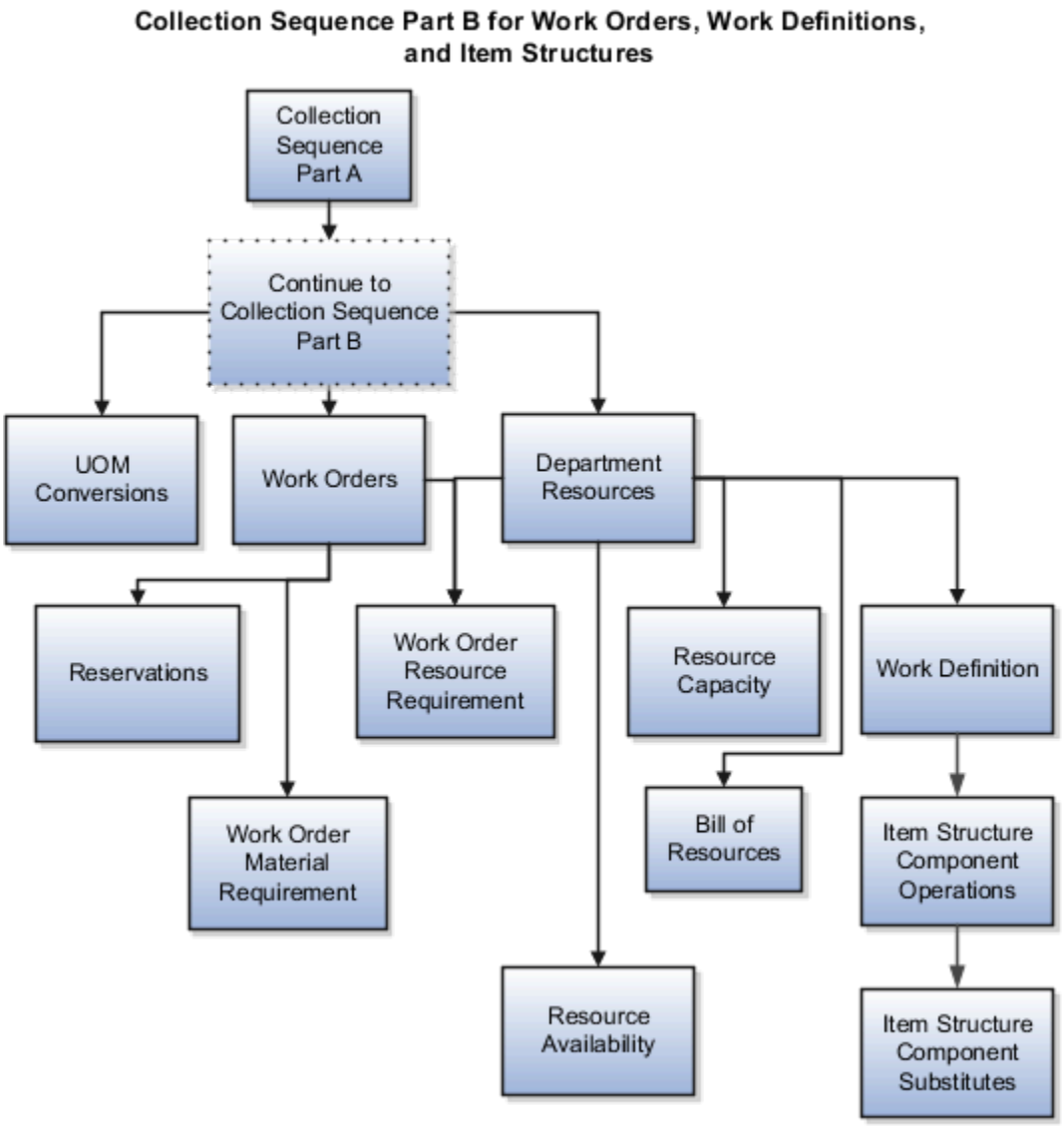
The following image shows the collections sequence to follow while collecting Sales Order and Assignment Sets data from external source systems. The data entities in Part B are dependent on Part A. So, you must collect entities listed in Part A before you collect the entities in Part B.

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.



Import Templates Used to Create CSV Files for Oracle Supply Chain Planning

You can use the file-based data import (FBDI) templates (.xlsm files) to prepare data for the supported collection entities for Oracle Fusion Cloud Supply Chain Planning.

The import templates are listed in the *File-Based Data Import (FBDI) for SCM* guide. Extract the import templates to a local drive, enter data as described in the import templates, and generate comma-separated values (CSV) files. Compress the CSV files to a .zip file, and upload it to the WebCenter Content server using the File Import and Export utility. The data is then loaded to the planning data repository.

Load 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 Collections Entity column provides the names of the entities for which you can load data. The Topic Name column provides the names of the topics in the FBDI guide from where you'll download the import templates. The Import Template column provides the file names of the import templates that you'll download for the collections entities.

Collections Entity	Topic Name	Import Template
Aggregation levels for customer data	Supply Chain Planning Key Customer Options	ScpKeyCustomerOptionsImportTemplate.xlsm
Allocation assignments and allocation rules	Supply Chain Planning Planning Allocation Rules	ScpPlanningAllocationRulesImportTemplate.xlsm
Available to promise (ATP) assignments and ATP rules	Supply Chain Planning Available-to-Promise Rules	ScpATPRulesImportTemplate.xlsm
Booking history	Supply Chain Planning Bookings History	ScpBookingHistoryImportTemplate.xlsm
Causal factors	Supply Chain Planning Causal Factors	ScpCausalFactorsImportTemplate.xlsm
Cross-reference data	Cross-Reference Data	CrossReferenceDataImportTemplate.xlsm
Customer-specific item relationships	Supply Chain Planning Item Substitute	ScpItemSubstituteImportTemplate.xlsm
Demand classes	Supply Chain Planning Demand Classes	ScpDemandClassImportTemplate.xlsm
Fiscal calendars	Supply Chain Planning Fiscal Calendars	ScpFiscalCalendarImportTemplate.xlsm
Forecast measures	Supply Chain Planning Forecast Measures	ScpForecastMeasureImportTemplate.xlsm **Note:** This template has been superseded by the generic import template ScpMeasuresImportTemplate.xlsm but will continue to be supported. Future enhancements will be made only to the generic import template.
Forecasts	Supply Chain Planning External Forecasts	ScpExternalForecastImportTemplate.xlsm
Item costs	Supply Chain Planning Item Cost	ScpItemCostImportTemplate.xlsm
Item suppliers (approved suppliers list)	Supply Chain Planning Approved Supplier List	ScpApprovedSupplierListImportTemplate.xlsm

Collections Entity	Topic Name	Import Template
Measures	Supply Chain Planning Measures	ScpMeasuresImportTemplate.xlsm **Note:** You must use separate CSV files to collect measure data for measures with different dimensional granularity.
Option bookings history	Supply Chain Planning Option Bookings History	ScpOptionBookingHistoryImportTemplate.xlsm
Option shipments history	Supply Chain Planning Option Shipments History	ScpOptionShipmentHistoryImportTemplate.xlsm
Planned order supplies	Supply Chain Planning Planned Order Supply	ScpPlannedOrderSupplyImportTemplate.xlsm **Note:** This template is used only to load planned order supplies to Oracle Global Order Promising.
Planners	Supply Chain Planning Planners	ScpPlannersImportTemplate.xlsm
Price lists	Supply Chain Planning Price Lists	ScpPriceListImportTemplate.xlsm
Safety stock levels	Supply Chain Planning Safety Stock Levels	ScpSafetyStockLevelImportTemplate.xlsm
Shipments history	Supply Chain Planning Shipments History	ScpShipmentHistoryImportTemplate.xlsm
Sourcing rules and assignments	Supply Chain Planning Sourcing Rules	ScpSourcingImportTemplate.xlsm
Supplier capacity	Supply Chain Planning Approved Supplier Capacity	ScpApprovedSupplierCapacityImportTemplate.xlsm
Supply update rules	Supply Chain Planning Real Time Supply Updates	ScpRealTimeSupplyUpdatesImportTemplate.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 Collections Entity column provides the names of the entities for which you can load data. The Topic Name column provides the names of the topics in the FBDI guide from where you'll download the import templates. The Import Template column provides the file names of the import templates that you'll download for the collections entities.

Collections Entity	Topic Name	Import Template
Aggregation levels for customer data	Supply Chain Planning Key Customer Options	ScpKeyCustomerOptionsImportTemplate.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
Bookings history	Supply Chain Planning Bookings History	ScpBookingHistoryImportTemplate.xlsm
Calendar associations	Supply Chain Planning Calendar Assignments	ScpCalendarAssignmentsImportTemplate.xlsm
Calendars, calendar shifts, calendar exceptions, calendar week start days, calendar workday patterns, and calendar period start dates	Supply Chain Planning Calendars	ScpCalendarImportTemplate.xlsm
Carriers, ship modes of transport, and ship classes of service	Supply Chain Planning Carriers	ScpCarrierImportTemplate.xlsm
Causal factors	Supply Chain Planning Causal Factors	ScpCausalFactorsImportTemplate.xlsm
Cross-reference data	Cross-Reference Data	CrossReferenceDataImportTemplate.xlsm
Currencies, currency conversion types, and currency conversion rates	Supply Chain Planning Currencies	ScpCurrencyImportTemplate.xlsm
Customer-specific item relationships	Supply Chain Planning Item Substitute	ScpItemSubstituteImportTemplate.xlsm
Demand classes	Supply Chain Planning Demand Classes	ScpDemandClassImportTemplate.xlsm
Fiscal calendars	Supply Chain Planning Fiscal Calendars	ScpFiscalCalendarImportTemplate.xlsm
Forecast measures	Supply Chain Planning Forecast Measures	ScpForecastMeasureImportTemplate.xlsm **Note:** This template has been superseded by the generic import template ScpMeasuresImportTemplate.xlsm but will continue to be supported. Future enhancements will be made only to the generic import template.
Forecasts	Supply Chain Planning External Forecasts	ScpExternalForecastImportTemplate.xlsm
Historical receipt transactions	Supply Chain Planning Measures	ScpMeasuresImportTemplate.xlsm

Collections Entity	Topic Name	Import Template
Interlocation shipping networks and transit times	Supply Chain Planning Interlocation Shipping Methods	ScpInterLocationShipMethodsImportTemplate.xlsm
Item costs	Supply Chain Planning Item Cost	ScpItemCostImportTemplate.xlsm
Item suppliers (approved suppliers list)	Supply Chain Planning Approved Supplier List	ScpApprovedSupplierListImportTemplate.xlsm
Lookup codes, document categories, invoicing and accounting rules, payment terms, receipt methods, and sales credit types for Oracle Order Management	Order Orchestration	OrderOrchestrationImportTemplate.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.
On hand	Supply Chain Planning Supply On Hand	ScpOnhandImportTemplate.xlsm
Option bookings history	Supply Chain Planning Option Bookings History	ScpOptionBookingHistoryImportTemplate.xlsm
Option shipments history	Supply Chain Planning Option Shipments History	ScpOptionShipmentHistoryImportTemplate.xlsm
Organizations (warehouses) and organization sites (including organization site-internal location mappings)	Supply Chain Planning Organizations	ScpOrganizationImportTemplate.xlsm
Planned order supplies	Supply Chain Planning Planned Order Supply	ScpPlannedOrderSupplyImportTemplate.xlsm **Note:** This template is only used to load planned order supplies to Global Order Promising.
Planners	Supply Chain Planning Planners	ScpPlannersImportTemplate.xlsm
Price lists	Supply Chain Planning Price Lists	ScpPriceListImportTemplate.xlsm
Purchase orders (POs), purchase requisitions, POs in receiving, and POs in transit	Supply Chain Planning Purchase Order Requisitions	ScpPurchaseOrderRequisitionImportTemplate.xlsm

Collections Entity	Topic Name	Import Template
Resource availability	Supply Chain Planning Resource Availability	ScpResourceAvailabilityImportTemplate.xlsm
Resources and resource shifts	Supply Chain Planning Resources	ScpResourcesImportTemplate.xlsm
Safety stock levels	Supply Chain Planning Safety Stock Levels	ScpSafetyStockLevelImportTemplate.xlsm
Shipments history	Supply Chain Planning Shipments History	ScpShipmentHistoryImportTemplate.xlsm
Sourcing rules and assignments	Supply Chain Planning Sourcing Rules	ScpSourcingImportTemplate.xlsm
Subinventories	Supply Chain Planning Subinventories	ScpSubInventoryImportTemplate.xlsm
Supplier capacity	Supply Chain Planning Approved Supplier Capacity	ScpApprovedSupplierCapacityImportTemplate.xlsm
Suppliers and supplier sites	Supply Chain Planning Suppliers	ScpSupplierImportTemplate.xlsm
Supply reservations for sales orders	Supply Chain Planning Reservations	ScpReservationImportTemplate.xlsm
Supply update rules	Supply Chain Planning Real Time Supply Updates	ScpRealTimeSupplyUpdatesImportTemplate.xlsm
Transfer orders (including expense-type transfers)	Supply Chain Planning Transfer Orders	ScpTransferOrderImportTemplate.xlsm
Units of Measure (UOMs), UOM conversions, and UOM class conversions	Supply Chain Planning Units of Measure	ScpUOMImportTemplate.xlsm
User-defined hierarchies	Supply Chain Planning User-Defined Hierarchy	ScpUser-DefinedHierarchyImportTemplate.xlsm
Work definitions (including mappings between item structures and work definitions), work definition operations, and work definition operation resources	Supply Chain Planning Routings	ScpRoutingsImportTemplate.xlsm
Work order material requirements	Supply Chain Planning Work Order Component Demands	ScpWIPComponentDemandsImportTemplate.xlsm
Work order resource requirements	Supply Chain Planning Work Order Operation Resources	ScpWIPOperationResourceImportTemplate.xlsm
Work order supplies	Supply Chain Planning Work Order Supplies	ScpWorkOrderSuppliesImportTemplate.xlsm

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 Collections Entity column provides the names of the entities for which you can load data. The Topic Name column provides the names of the topics in the FDBI guide from where you'll download the import templates. The Import Template column provides the file names of the import templates that you'll download for the collections entities.

Collections Entity	Topic Name	Import Template
Aggregation levels for customer data	Supply Chain Planning Key Customer Options	ScpKeyCustomerOptionsImportTemplate.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
Bill of resources	Supply Chain Planning Bill of Resources	ScpBillOfResourcesImportTemplate.xlsm
Bookings history	Supply Chain Planning Bookings History	ScpBookingHistoryImportTemplate.xlsm
Calendar associations	Supply Chain Planning Calendar Assignments	ScpCalendarAssignmentsImportTemplate.xlsm
Calendars, calendar shifts, calendar exceptions, calendar week start days, calendar workday patterns, and calendar period start dates	Supply Chain Planning Calendars	ScpCalendarImportTemplate.xlsm
Carriers, ship modes of transport, and ship classes of service	Supply Chain Planning Carriers	ScpCarrierImportTemplate.xlsm
Catalogs, categories, and item categories	Supply Chain Planning Catalogs	ScpCatalogImportTemplate.xlsm
Causal factors	Supply Chain Planning Causal Factors	ScpCausalFactorsImportTemplate.xlsm
Cross-reference data	Cross-Reference Data	CrossReferenceDataImportTemplate.xlsm
Currencies, currency conversion types, and currency conversion rates	Supply Chain Planning Currencies	ScpCurrencyImportTemplate.xlsm
Customer-specific item relationships	Supply Chain Planning Item Substitute	ScpItemSubstituteImportTemplate.xlsm
Customers and customer sites	Supply Chain Planning Customers	ScpCustomerImportTemplate.xlsm
Demand classes	Supply Chain Planning Demand Classes	ScpDemandClassImportTemplate.xlsm

Collections Entity	Topic Name	Import Template
Fiscal calendars	Supply Chain Planning Fiscal Calendars	ScpFiscalCalendarImportTemplate.xlsm
Forecast measures	Supply Chain Planning Forecast Measures	ScpForecastMeasureImportTemplate.xlsm **Note:** This template has been superseded by the generic import template ScpMeasuresImportTemplate.xlsm but will continue to be supported. Future enhancements will be made only to the generic import template.
Forecasts	Supply Chain Planning External Forecasts	ScpExternalForecastImportTemplate.xlsm
Historical receipt transactions	Supply Chain Planning Measures	ScpMeasuresImportTemplate.xlsm
Interlocation shipping networks and transit times	Supply Chain Planning Interlocation Shipping Methods	ScpInterLocationShipMethodsImportTemplate.xlsm
Item costs	Supply Chain Planning Item Cost	ScpItemCostImportTemplate.xlsm
Item structures	Supply Chain Planning Item Structures	ScpBillofMaterialImportTemplate.xlsm
Item suppliers (approved suppliers list)	Supply Chain Planning Approved Supplier List	ScpApprovedSupplierListImportTemplate.xlsm
Items	Supply Chain Planning Items	ScpItemImportTemplate.xlsm
Locations and region-location mappings	Supply Chain Planning Locations	ScpLocationsImportTemplate.xlsm
Lookup codes, document categories, invoicing and accounting rules, payment terms, receipt methods, and sales credit types for Order Management	Order Orchestration	OrderOrchestrationImportTemplate.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.
On hand	Supply Chain Planning Supply On Hand	ScpOnhandImportTemplate.xlsm
Option bookings history	Supply Chain Planning Option Bookings History	ScpOptionBookingHistoryImportTemplate.xlsm

Collections Entity	Topic Name	Import Template
Option shipments history	Supply Chain Planning Option Shipments History	ScpOptionShipmentHistoryImportTemplate.xlsm
Organizations (warehouses) and organization sites (including organization site-internal location mappings)	Supply Chain Planning Organizations	ScpOrganizationImportTemplate.xlsm
Planned order supplies	Supply Chain Planning Planned Order Supply	ScpPlannedOrderSupplyImportTemplate.xlsm **Note:** This template is only used to load planned order supplies to Global Order Promising.
Planners	Supply Chain Planning Planners	ScpPlannersImportTemplate.xlsm
POs, purchase requisitions, POs in receiving, and POs in transit	Supply Chain Planning Purchase Order Requisitions	ScpPurchaseOrderRequisitionImportTemplate.xlsm
Price lists	Supply Chain Planning Price Lists	ScpPriceListImportTemplate.xlsm
Region-zone mappings	Supply Chain Planning Region Zone Mappings	ScpRegionZoneMappingImportTemplate.xlsm
Regions	Supply Chain Planning Regions	ScpRegionsImportTemplate.xlsm
Resource availability	Supply Chain Planning Resource Availability	ScpResourceAvailabilityImportTemplate.xlsm
Resources and resource shifts	Supply Chain Planning Resources	ScpResourcesImportTemplate.xlsm
Safety stock levels	Supply Chain Planning Safety Stock Levels	ScpSafetyStockLevelImportTemplate.xlsm
Sales orders	Supply Chain Planning Sales Orders	ScpSalesOrderImportTemplate.xlsm
Shipments history	Supply Chain Planning Shipments History	ScpShipmentHistoryImportTemplate.xlsm
Sourcing rules and assignments	Supply Chain Planning Sourcing Rules	ScpSourcingImportTemplate.xlsm
Subinventories	Supply Chain Planning Subinventories	ScpSubInventoryImportTemplate.xlsm
Supplier capacity	Supply Chain Planning Approved Supplier Capacity	ScpApprovedSupplierCapacityImportTemplate.xlsm
Suppliers and supplier sites	Supply Chain Planning Suppliers	ScpSupplierImportTemplate.xlsm
Supply reservations for sales orders	Supply Chain Planning Reservations	ScpReservationImportTemplate.xlsm

Collections Entity	Topic Name	Import Template
Supply update rules	Supply Chain Planning Real Time Supply Updates	ScpRealTimeSupplyUpdatesImportTemplate.xlsm
Transfer orders (including expense-type transfers)	Supply Chain Planning Transfer Orders	ScpTransferOrderImportTemplate.xlsm
UOMs, UOM conversions, and UOM class conversions	Supply Chain Planning Units of Measure	ScpUOMImportTemplate.xlsm
User-defined hierarchies	Supply Chain Planning User-Defined Hierarchies	ScpUser-DefinedHierarchyImportTemplate.xlsm
Work definitions (including mappings between item structures and work definitions), work definition operations, and work definition operation resources	Supply Chain Planning Routings	ScpRoutingsImportTemplate.xlsm
Work order material requirements	Supply Chain Planning Work Order Component Demands	ScpWIPComponentDemandsImportTemplate.xlsm
Work order resource requirements	Supply Chain Planning Work Order Operation Resources	ScpWIPOperationResourceImportTemplate.xlsm
Work order supplies	Supply Chain Planning Work Order Supplies	ScpWorkOrderSuppliesImportTemplate.xlsm
Zones	Supply Chain Planning Zones	ScpZonesImportTemplate.xlsm

Related Topics

- Load Planning Data from Files

Loading of Measure Data at Aggregate Levels

Use the file-based data import (FBDI) templates to load measure data at aggregate levels for your module in Oracle Fusion Cloud Applications.

About the Aggregation and Disaggregation of Measure Data

When you load data for a measure at an aggregate level, you're loading data at a level that's higher than the level that the data is stored at.

When measure data is loaded at an aggregate level, it's disaggregated to the stored level during the data refresh. The data refresh occurs when you run your plan by refreshing it with current data using the Run Plan dialog box or **Batch Run Plan** scheduled process. The data refresh also occurs when you submit the scheduled process named **Orchestrate Refresh Measures Processes**.

For example, the Sales Forecast measure is stored at the Customer Site, Demand Class, Organization, Item, Sales Rep, and Day levels. If you load the measure at the Customer (parent level for Customer Site), Demand Class, Organization, Category Level 1 (parent level for Item), Sales Rep, and Day levels, when you run your plan while refreshing it with current data, the data will be disaggregated from the Customer level to the Customer Site level and from the Category Level 1 level to the Item level based on the demand history. The data is disaggregated for only those customer sites and items for which demand history was loaded at the stored levels, or the data for another measure with the same stored levels as the Sales Forecast measure was loaded at the stored levels.

More Points About Loading Measure Data at Aggregate Levels

Note these points about loading measure data at aggregate levels:

- Before loading measure data at an aggregate level, you must first load historical demand data because it's used as the basis for disaggregating measure data loaded or generated at an aggregate level.

  Historical demand data must be loaded at the levels that it's stored at: Item, Organization, Customer Site, Demand Class, Sales Rep, and Day. The Demand Class is required for demand, demand and supply, and sales and operations plans and is optional for replenishment plans. The Sales Rep level is required for only sales and operations plans.
- You must use the import templates to load measures for historical demand data as follows:
  - Supply Chain Planning Bookings History (ScpBookingHistoryImportTemplate.xlsm)
    - Bookings History: Booked Item by Booked Date
    - Bookings History: Booked Item by Promised Date
    - Bookings History: Booked Item by Requested Date
    - Bookings History: Booked Item by Scheduled Ship Date
    - Bookings History: Requested Item by Booked Date
    - Bookings History Value: Booked Item by Booked Date
    - Bookings History Value: Booked Item by Promised Date
    - Bookings History Value: Booked Item by Requested Date
    - Bookings History Value: Booked Item by Scheduled Ship Date
    - Bookings History Value: Requested Item by Booked Date
  - Supply Chain Planning Option Bookings History (ScpOptionBookingHistoryImportTemplate.xlsm)
    - Option Bookings History
  - Supply Chain Planning Option Shipments History (ScpOptionShipmentHistoryImportTemplate.xlsm)
    - Option Shipments History
  - Supply Chain Planning Shipments History (ScpShipmentHistoryImportTemplate.xlsm)
    - Shipments History: Requested Item by Shipped Date
    - Shipments History: Shipped Item by Promised Date
    - Shipments History: Shipped Item by Requested Date
    - Shipments History: Shipped Item by Scheduled Ship Date
    - Shipments History: Shipped Item by Shipped Date
    - Shipments History Value: Requested Item by Shipped Date
    - Shipments History Value: Shipped Item by Promised Date
    - Shipments History Value: Shipped Item by Requested Date
    - Shipments History Value: Shipped Item by Scheduled Ship Date
    - Shipments History Value: Shipped Item by Shipped Date
- You can load forecast data at the level that it's stored at or an aggregate level using the import template named Supply Chain Planning Forecast Measures (ScpForecastMeasureImportTemplate.xlsm) for these measures:

    - Imported Forecast
    - Marketing Forecast
    - Marketing Forecast Value
    - Sales Forecast
    - Sales Forecast Value

- You can use the import template named Supply Chain Planning Measures (ScpMeasuresImportTemplate.xlsm) to load any measure for which a specific import template isn't available.
- Before you load data at an aggregate level for a measure, you must already have loaded another measure with the same dimensions and stored levels as the first measure. Otherwise, the underlying combinations for the dimension levels won't exist, and the aggregate data can't be disaggregated. The underlying dimensions and levels for both measures need to be the same.

  For example, assume that you've a measure called MyForecast that has the Product, Organization, and Time dimensions and is stored at the Item, Organization, and Day levels. Before you can load MyForecast at an aggregate level such as Category Level 1, Business Unit, and Month, you should have loaded another measure with the same dimensions at the Item, Organization, and Day levels. Otherwise, the underlying item-organization-day combinations won't exist, and aggregate data for MyForecast won't be disaggregated. If the second measure included the Customer dimension, the disaggregation of data for MyForecast won't happen.
- Don't load the same measure at different levels of aggregation. For example, don’t load a measure at both the Category Level 1 and Category Level 2 levels.
- When loading measure data at an aggregate level, you must specify the name of the hierarchy and level that you’re using in the import templates. Also, ensure that the hierarchy is included in the dimension catalog selected for your plan.

  For a demand plan that's using a hybrid time hierarchy, you can import data to any aggregate level for the hybrid time hierarchy that you selected as the planning calendar or a corresponding hybrid time hierarchy. If you're not importing data at the time level of the measure, enter the name of the hybrid time hierarchy in the Time Hierarchy Name column of the import template.
- For your demand, demand and supply, sales and operations, or supply plan, for plan-specific measures that include the Customer dimension, you can load the aggregate data without specifying a customer level by entering the **#ignore** parameter in the Customer Level Name column of the import templates. In this case, you must not enter any value in the Customer Level Member Name and Customer Site Level Member Name columns. Effectively, you’re aggregating the data by the customer level, and the aggregate data is disaggregated to the existing customer sites based on the disaggregation parameters of the measures.

  If you don’t want to specify the customer level name, then you must use the #ignore parameter while loading data at the stored level and also at the aggregate level.

  > **Note:** For a replenishment plan, for plan-specific measures that include the Customer dimension, you must enter the **#ignore** parameter in the Customer Level Name column of your import template to ignore the Customer dimension in the imported measure data because this dimension isn’t supported for replenishment plans. Otherwise, the load process will fail. You must enter this parameter while loading data at the stored and aggregate levels.

- For your demand, demand and supply, sales and operations, or supply plan, for measures that include the Demand Class dimension, you can load the aggregate data without specifying a demand class level by entering the **#ignore** parameter in the Demand Class Level Name column of the import templates. In this case, you must not enter any value in the Demand Class Level Member Name column. Effectively, you’re aggregating the

data by the demand class level, and the aggregate data is disaggregated to the existing demand classes based on the disaggregation parameters of the measures.

If you don't want to specify the demand class, then you must use the #ignore parameter while loading data at the stored level and also at the aggregate level.

> **Note:** For a replenishment plan, for plan-specific measures that include the Demand Class dimension, you must enter the **#ignore** parameter in the Demand Class Level Name column of your import template to ignore the Demand Class dimension in the imported measure data because this dimension isn't supported for replenishment plans. Otherwise, the load process will fail. You must enter this parameter while loading data at the stored and aggregate levels.

- After you load data for a measure, during the subsequent plan run, data can either be aggregated or disaggregated based on the planning time level of the plan. However, both aggregation and disaggregation of measure data can't happen at the same time. This limitation usually crops up when the measure includes the Time dimension, and the planning time level is higher than a day. Don't load measure data that needs to be disaggregated on one dimension and aggregated on another dimension.

  Consider an example in which you've a measure that's defined at the levels of Item, Organization, Customer Site, Demand Class, and Day. The following table explains what happens when you load the measure for a day-level plan and a month-level plan:

Load Level	Planning Time Level	Scenario Supported?	Comment
Item, Organization, Customer Site, Demand Class, Day	Day	Yes	The load is at the stored level. During the plan run, no aggregation or disaggregation of the data is done.
Item, Organization, Customer Site, Demand Class, Month	Day	Yes	The load is at the aggregate level. Data is aggregated by the Time dimension. During the plan run, the data is disaggregated from month to day.
Item, Organization, Customer Class, Demand Class, Day	Day	Yes	The load is at the aggregate level. Data is aggregated by the Customer dimension. During the plan run, the data is disaggregated from customer class to customer site.
Item, Organization, Customer Class, Demand Class, Month	Day	Yes	The load is at the aggregate level. Data is aggregated by the Customer and Time dimensions. During the plan run, the data is disaggregated from month

Load Level	Planning Time Level	Scenario Supported?	Comment
			to day and then from customer class to customer site.
Item, Organization, Customer Site, Demand Class, Day	Month	Yes	The load is at the stored level. During the plan run, the data is aggregated from day to month.
Item, Organization, Customer Site, Demand Class, Month	Month	Yes	The load is at the aggregate level. Data is aggregated by the Time dimension. During the plan run, no aggregation or disaggregation of the data is done.
Category Level 2, Business Unit, Customer Site, Demand Class, Month	Month	Yes	The load is at the aggregate level. Data is aggregated by the Product, Organization, and Time dimensions. During the plan run, data is disaggregated from category to item and from business unit to organization.
Category Level 2, Organization, Customer Site, Demand Class, Day	Month	No	The load is at the aggregate level. Data is aggregated by the Product dimension. During the plan run, the data must be aggregated from day to month and then disaggregated from category to item. This scenario isn't supported. In this case, the records are collected but won't show up in the plan.

Related Topics

- Import Templates Used to Create CSV Files for Oracle Supply Chain Planning

Load Planning Data from Files

This topic explains how you submit the scheduled process named Load Planning Data from Flat Files from your work area in Oracle Fusion Cloud Supply Chain Planning.

In your work area, on the Tasks panel tab, in Plan Inputs, you can click **Load Planning Data from Files** to open a dialog box through which you can submit the scheduled process named **Load Planning Data from Flat Files**. You can use this dialog box to submit the scheduled process from an Oracle Supply Chain Planning work area instead of going to the Scheduled Processes work area.

Before you start

Before you submit your scheduled process, you must prepare a compressed (.zip) file with the comma-separated values (.csv) files for the file-based data import (FBDI) templates that you're using to load your data. The compressed file can contain the .csv files for different import templates.

Then, you must upload your file using the File Import and Export page to the scm/planningDataLoader/import account on the WebCenter Content server. For information about the page, see the guide named *Implementing Common Features for SCM*.

Points to Note

Note these points while using this feature:

- See the instructions in the import templates before using them.

  For information about the import templates, see the guide named *File-Based Data Import (FBDI) for SCM*.
- You can load data using a compressed file only once.

  Once you load the file, its status changes, and you can't use it again.
- You can use the scheduled process named **Load Planning Data from Flat Files** to load data into your planning repository from external sources, such as legacy systems and third-party applications. You can also use the scheduled process to load data from Oracle Fusion Cloud Applications.

  If you've selected a Fusion source system, you can't load some entities. For example, you can't load customers because they're collected with the use of the Collect Planning Data page.

  For a list of the allowed entities for different source systems, see the topic titled *Import Templates Used to Create CSV Files for Oracle Supply Chain Planning*.
- If any string in your data contains special characters, enclose the entire string in quotation marks.

  Ensure that no string in your data contains special characters in the middle.

  Otherwise, the scheduled process will end in an error.
- When the collection type is targeted, the data in the planning repository is deleted for an entity for which data is loaded through the compressed file, and the data in the compressed file is loaded thereafter. For example, if you're loading item costs through the import template named Supply Chain Planning Item Cost (ScpItemCostImportTemplate.xlsm), the item-cost data in the planning repository is deleted before the data

in the compressed file is loaded. The entities for which data isn't loaded through the compressed file remain untouched in the planning repository.

> **CAUTION:** If you select targeted as the collection type, the data in the planning repository is replaced with data for the entities in the compressed file. There's no way to recover this data. If you accidentally selected the targeted collection type, then you need to reload all the data for the affected entities.

- When the collection type is net change, existing data for combinations in the planning repository is updated with changed data for the same combinations in the compressed file. If the combinations don't exist in the planning repository, the combinations are created with the data in the compressed file.

  For example, if the compressed file contains data for five item-organization combinations that already exist in the planning repository, the records in the planning repository are updated if the data has changed. If the planning repository contains data for only three item-organization combinations, the records are updated if required for these item-organization combinations, and records are created for the remaining two item-organization combinations.

  > **Note:** Before you can use the net-change collection type for an entity, you should have run the scheduled process named **Load Planning Data from Flat Files** with the targeted collection type once for the entity.

- For Oracle Fusion source systems, you can load data by organization groups for only the net-change collection type.

  For source systems of the Others or External version, you can load data by organization groups for the targeted or net-change collection type.

  The organization groups are those that you set up on the Organizations tab on the Maintain Supply Network Model page.

  To know about the entities for which you can load data by organization groups, see the topic titled *Load Planning Data from Files for a Selected Group of Organizations*.

- When you load data by organization groups, data in the compressed file is processed for only the organizations in the selected groups.

  Any data in the compressed file that isn't dimensioned by the Organization dimension is ignored during targeted or net change collection for source systems of all versions. If the compressed file contains reference data and demand planning data, such as price lists and history, this data is ignored when you load data by organization groups.

- When you load external forecasts using the import template named Supply Chain Planning External Forecasts (ScpExternalForecastImportTemplate.xlsm), you can choose to retain the forecast designators when you're performing a targeted collection of external forecasts for the second or a subsequent time.

  This selection isn't relevant when you're performing a targeted collection of external forecasts for the first time because whatever data is in the compressed file will be loaded into the planning repository.

  When the collection type is net change, the forecast designators in the planning repository are retained.

- If the loaded data pertains to hierarchies, such as those for organizations, items, customers, and suppliers, the scheduled process named **Create Trees for Dimensions** is called by the scheduled process named **Load Planning Data from Flat Files**.

  Therefore, ensure that you've the privileges for running the scheduled process named **Create Trees for Dimensions**. Otherwise, the scheduled process will fail, and data won't be loaded correctly.

- You can load data for only measures that have the **Refresh with current data** checkbox selected on the Properties subtab on the Advanced tab in the Create Measure dialog box.

  > **Note:** If the measure has the **Allow editing** checkbox selected in the Create Measure dialog box, you'll lose manually entered measure values whenever you load data. Therefore, you should avoid selecting the **Allow editing** and **Refresh with current data** checkboxes together for a measure.

- For purging previously loaded data based on a date range for only time-dimensioned measures from the MSC_MEASURE_DATA table, you must use these import templates:
  - Supply Chain Planning Bookings History (ScpBookingHistoryImportTemplate.xlsm)
  - Supply Chain Planning Causal Factors (ScpCausalFactorsImportTemplate.xlsm)
  - Supply Chain Planning Forecast Measures (ScpForecastMeasureImportTemplate.xlsm)
  - Supply Chain Planning Measures (ScpMeasuresImportTemplate.xlsm)
  - Supply Chain Planning Option Bookings History (ScpOptionBookingHistoryImportTemplate.xlsm)
  - Supply Chain Planning Option Shipments History (ScpOptionShipmentHistoryImportTemplate.xlsm)
  - Supply Chain Planning Shipments History (ScpShipmentHistoryImportTemplate.xlsm)

  In the import templates, you must enter YES in the Delete Indicator column for the combinations for which data must be purged.

  > **Tip:** You typically use this feature when you want to purge the data that was recently collected before you load the latest data. For example, if you're loading data for the measure named Bookings History: Booked Item by Scheduled Ship Date, the data would have typically changed over the last few days because of changes in the scheduled ship dates. Therefore, you'd want to load the data for the last few days while making no changes to the data for other time periods. You can't use the net-change collection type in this case because the data for the last few days won't get purged and would instead be updated if required for the same combinations in the planning repository and compressed file.

- The null value in the **Number of Days Before Today** or **Number of Days After Today** fields is treated as zero. If the value in these fields is zero, the previously loaded data for time-dimensioned measures is purged for the current date.
- Ensure that the date range you specify for purging previously loaded data for time-dimensioned measures matches the date range for which you're loading data. If the date range for purging data doesn't match the date range for which you're loading data, you could lose data. The data is loaded for only the dates specified in the .csv files.

  For example, if your date range for purging time-dimensioned measures is 01-Nov-2023 to 19-Nov-2023, and your date range for loading data is 06-Nov-2023 to 19-Nov-2023, you'll lose the previously loaded data from 01-Nov-2023 to 05-Nov-2023.
- For the date range for purging previously loaded data for time-dimensioned measures, if the profile option code named MSC_FIXED_DATE is set, the profile value is taken as the current date. Otherwise, the system date is taken as the current date.
- Your selections for purging data for time-dimensioned measures don't affect the data for measures that aren't dimensioned by time and that are covered by the .csv files in the compressed file.

- Ensure that you run only one instance of the scheduled process named **Load Planning Data from Flat Files** at a time for a combination of a source system and an organization group.

  Don't run a targeted collection and a net change collection for the same entity at the same time.

  To avoid performance-related issues, don't submit the scheduled process again shortly after having submitted it.

Here's what to do

1. From your work area in Oracle Supply Chain Planning, on the Tasks panel tab, in Plan Inputs, click **Load Planning Data from Files**.

   The Load Planning Data from Files dialog box opens.
2. Provide the parameters for the scheduled process:
   a. In **Source System**, select a source system.

      The name can pertain to the external source from which the data originated or the Fusion source system that's being supplemented with the loaded data.
   b. In **Collection Type**, select the collection type.
   c. In **Data File**, select the compressed file that you previously prepared and uploaded to the WebCenter Content server.
   d. In **Enable Organization Group Collection**, select **Yes** to load data by organization groups.

      Otherwise, select **No**.
   e. If you're loading data for an organization group, in **Organization Group**, select your organization group.
   f. In **Retain Other External Forecast Designators**, select **Yes** or **No**.
   g. In **Enable Date Range for Purging Time-Dimensioned Measures**, select **Yes** or **No**.
   h. If you're purging data for time-dimensioned measures, enter the date range in the **Number of Days Before Today** and **Number of Days After Today** fields.
3. Enter submission notes for the scheduled process.
4. To be notified when the scheduled process ends whether the outcome is successful or not, select the checkbox named **Notify me when this process ends**.
5. To use the advanced options, click **Advanced**:
   a. On the Schedule tab, select **As soon as possible** to submit the scheduled process immediately.

      Or, select **Using a schedule**, and use the fields that appear to submit the scheduled process later or according to a schedule.
   b. On the Notification tab, provide the details of individuals who must be notified when the scheduled process ends and the conditions in which the notifications are sent.
6. Click **Submit**.

   A confirmation dialog box is displayed. You can use the displayed process ID to search for the result of the scheduled process in the Scheduled Processes work area. For more information, see the topic titled *Verify the Load Planning Data from Files Process*.
7. Click **OK**.

What to do next

After loading the data, you can check for errors using the Collected Measure Data table in the Plan Inputs work area. For information, see the topic titled *View Collected Data for Measures Before Running a Plan*.

For data that you load using the import template named Supply Chain Planning Safety Stock Levels (ScpSafetyStockLevelImportTemplate.xlsm), you must check the MSC_SAFETY_STOCK_TXNS table.

Related Topics

- Create CSV Files to Load Planning Data
- Load Planning Data from Flat Files

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	• 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	• On Hand • Transfer Orders • Purchase Orders and Purchase Requisitions • Sales Order and Associated Reservations • Work Order Component Demands

Source	Entities
	• Work Order Supplies, Work Order By-Product and Co-Product Supplies, Work Order Operation Resources • Resource Availability **Note:** These entities are in addition to those mentioned in the previous row for the Oracle Fusion Cloud SCM source.
From an external source	• 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

How You Extract Data from Oracle E-Business Suite for Loading

This topic provides a high-level overview of how you extract data from Oracle E-Business Suite for loading into Oracle Fusion Cloud Supply Chain Planning.

You must run the concurrent program named **Extract data for Oracle Supply Chain Planning Cloud** in Oracle E-Business Suite for extracting your data.

Information about the concurrent program, the installation and configuration of the functionality for integration between Oracle E-Business Suite and Oracle Supply Chain Planning, and the extraction process is available on My Oracle Support:

- KB71695: Integration For EBS 12.1.3 to Fusion Cloud Planning Applications - Release 11.13.17.11 or Later
- KB141796: Integration For EBS 12.2.x to Fusion Cloud Planning Applications - Release 13 update 18A or later (equivalent of 11.13.18.02.0)

The high-level process for extracting data from Oracle E-Business Suite and loading the data in Oracle Supply Chain Planning is as follows:

1. In Oracle E-Business Suite, run the concurrent program named **Extract data for Oracle Supply Chain Planning Cloud**, and generate the compressed (.zip extension) file with the comma-separated value (.csv extension) files for the data.
2. Download the .zip file to your local drive.
3. Depending on your requirement, add the .csv files that you've generated from file-based data import (FBDI) templates to the .zip file.
4. In Oracle Supply Chain Planning, on the File Import and Export page, search for the .zip file, and upload it to the scm/planningDataLoader/import account.
5. Run the scheduled process named **Load Planning Data from Flat Files** for the .zip file.

Related Topics

- Load Planning Data from Flat Files

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:
   - 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 **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 date

    Leave 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

Collect Resources and the Resource Availability

Overview of Collecting Resources and the Resource Availability

This topic provides an overview of collecting resources and the resource availability from Oracle Fusion Cloud Applications, Oracle E-Business Suite, or a third-party application.

When you collect information for resources in your organization, you collect their reference data. This information pertains to the names, codes, types, work centers, run rates, units of measure (UOMs), and shifts of the resources, among other attributes.

Regarding the availability of resources in your organization, you can collect this information or generate it during the collections process.

Sources and Methods for Collecting Resources and the Resource Availability

You collect resources and the resource availability from these sources:

- Oracle Fusion Cloud Manufacturing in Fusion Applications
- Oracle E-Business Suite
- A third-party application

If you're collecting resources and the resource availability from Oracle Manufacturing, you must use the Collect Planning Data page in the work area for your module in Oracle Fusion Cloud Supply Chain Planning. You can also use the **Collection Job Set** scheduled process.

If you're collecting resources and the resource availability from Oracle E-Business Suite or a third-party application, you must use the **Load Planning Data from Flat Files** scheduled process along with these file-based data import (FBDI) templates:

- Supply Chain Planning Resources (ScpResourcesImportTemplate.xlsm), in which you define your resources and resource shifts, and that's used for generating the resource availability
- Supply Chain Planning Resource Availability (ScpResourceAvailabilityImportTemplate.xlsm), which you optionally use to calculate the resource availability

More Points About Collecting Resources and the Resource Availability

Note these points about collecting resources and the resource availability:

- After you collect resources and the resource availability, you need to recollect the data only when there's a change to your resources or their availability.

- When you're collecting resources and the resource availability from Oracle Manufacturing, you can collect resources using the targeted or net change collection type.

  You can collect the resource availability using only the targeted collection type.
- When you're collecting resources and the resource availability from Oracle E-Business Suite or a third-party system, you can use the targeted or net change collection type.
- When you collect resources from Oracle Manufacturing, the resource types are labor and equipment. Both primary and alternate resources are collected.

  When you collect resources from Oracle E-Business Suite or a third-party system using the import template named Supply Chain Planning Resources, the resource types are person and machine. These resource types are reflected in Oracle Supply Chain Planning as labor and equipment.
- When you collect the resource availability from Oracle Manufacturing, you can choose to collect the data as is or have it regenerated by Oracle Manufacturing and then collect the data.
- Resources can be based on hours or units:
  - The UOMs for hours used by Oracle Supply Chain Planning can vary by setup.
  - Oracle Sales and Operations Planning considers both hour-based and unit-based resources.

    While the availability for some resources can be calculated in hours, the availability for other resources can be calculated in units.

    Sales and operations plans consider only primary resources.
  - Oracle Supply Planning considers only hour-based resources.

    Constrained supply plans use both primary and alternate resources, but unconstrained supply plans use only primary resources.

    Constrained and unconstrained supply plans support resources that are available 24 hours a day or in shifts. The resource availability can also be collected for nonworking days of manufacturing calendars if resource exceptions or work center calendars are defined on those days.
  - Oracle Demand Management and Oracle Replenishment Planning don't consider resources.
  - You can collect unit-based resources only through the import template named Supply Chain Planning Resources and from Oracle E-Business Suite or a third-party system.

    You can't collect unit-based resources from Oracle Manufacturing.

Related Topics

- Profile Option Codes and the Collection of Resources and the Resource Availability
- Collect Resources and the Resource Availability from Oracle Fusion Cloud Manufacturing
- Collect Resources and the Resource Availability from an External Source
- Collection Job Set
- Load Planning Data from Flat Files

Collect Resources and the Resource Availability from Oracle Fusion Cloud Manufacturing

This topic provides the procedure for collecting resources and the resource availability from Oracle Fusion Cloud Manufacturing in Oracle Fusion Cloud Applications.

You must collect resources and the resources availability from Oracle Manufacturing using the **Collection Job Set** scheduled process. You can submit the scheduled process from the following:

- Collect Planning Data page that you open from the work area for your module in Oracle Fusion Cloud Supply Chain Planning
- Scheduled Processes work area

  If you use the scheduled process in the Scheduled Processes work area, you first need to create a collection template for the resources and resource availability entities. The collection template must specify the date range type and whether the resource availability is collected as is from Oracle Manufacturing or regenerated in Oracle Manufacturing and then collected.

You can collect resources and the resource availability separately or with other reference, demand planning data, and supply planning data entities.

1. If you're using the Collect Planning Data page, follow these steps:
    a. In the work area for your module in Oracle Supply Chain Planning, on the Tasks panel tab, in Plan Inputs, click **Collect Planning Data**.

       The Collect Planning Data page opens.
    b. Select your source system.
    c. Select the collection type.

       Note that you can collect the resource availability only when you select the **Targeted** or **Automatic selection** collection type.
    d. If you've defined a collection template for collecting resources and the resource availability, select the template.

       In this case, you don't need to make any selections on the Reference Data and Supply Planning Data subtabs.
    e. To apply the filter named Organizations Filter for Items and Item Structures to the collection of resources and the resource availability, click **Select Collection Filters**, and configure the filter in the Select Collection Filters dialog box.

       Your collection template can also include collection filters. If so, you needn't perform this step.

       > **Note:** The **Organization Group** field is grayed out for the targeted or automatic selection collection type. Also, when the **Organization Group** field is set to **Yes** for the net change collection type, the Reference Data subtab is grayed out. To apply an organization group to the targeted collection of resources and the resource availability, use the collection filter named Organizations Filter for Items and Item Structures.

    f. On the Reference Data subtab, move the **Resources** entity from **Reference Entities** to **Selected Entities**.
    g. On the Supply Planning Data subtab, move the **Resource Availability** entity from **Supply Entities** to **Selected Entities**.

       The fields in the Resource Availability section are enabled.
    h. In **Date Range Type**, select **Fixed** to specify a date range for collecting the resource availability.

       For example, though you might have 10 years of resource availability data in Oracle Manufacturing, you want to collect only one year of data for your planning.

       Select **Relative to collection run date** to use the collection run date as the reference point for the date range.
    i. If you selected **Fixed** in the previous step, enter the start and end dates for the resource availability collection. Ensure that the dates are after the collection run date.

       If you selected **Relative to collection run date** in the previous step, enter a value in the **Collection Window in Days** field.

       The resource availability will be collected for the specified number of days after the collection run date.
    j. To collect the existing data for the resource availability from Oracle Manufacturing, select **Collect existing data**.

       To regenerate the resource availability data in Oracle Manufacturing before the collection, select **Regenerate data, and then collect**.

       When this option is selected, the **Collection Job Set** scheduled process calls the **Update Resource Availability Job** scheduled process for regenerating the resource availability. If you've recently submitted

the **Update Resource Availability Job** scheduled process, then you can select the **Collect existing data** option.

k. On the Schedule tab, to collect resources and the resource availability immediately, select **As soon as possible**.

   To collect resources and the resource availability according to a schedule, select **Using a schedule**, and specify values in the fields that appear.

l. Click **Submit**.

   A dialog box with the ID of the submitted scheduled process is displayed. You can query the status of the submitted process in the Scheduled Processes work area using use this process ID.

2. If you're using the **Collection Planning Set** scheduled process, follow these steps:
   a. Click **Navigator** > **Tools** > **Scheduled Processes**.

      The Overview page in the Scheduled Processes work area opens.

   b. Click **Schedule New Process**.

      The Schedule New Process dialog box opens.

   c. Click **Job Set**.
   d. Search for the **Collection Job Set** scheduled process, select it, and click **OK**.

      The Process Details dialog box opens.

   e. On the Processes tab, select the **Extract Master** scheduled process.

      The Parameters tab is displayed.

   f. Select your source system.
   g. Select the collection type.

      Note that you can collect the resource availability only when you select the **Targeted** or **Automatic selection** collection type.

   h. In **Collection Templates**, select the collection template that you created for collecting resources and the resource availability.

      You can't make any changes on the Reference Data and Supply Planning Data subtabs.

      The selected collection template should include any collection filter that you want to apply to your collection. You can use the collection filter named Organizations Filter for Items and Item Structures to filter your collection of resources and the resource availability by organizations.

   i. On the Schedule tab, to collect resources and the resource availability immediately, select **As soon as possible**.

      To collect resources and the resource availability according to a schedule, select **Using a schedule**, and specify values in the fields that appear.

   j. On the Notification tab, to receive information about the scheduled process after it's submitted, select or create a notification.
   k. Click **Submit**.

      A dialog box with the ID of the submitted scheduled process is displayed. You can query the status of the submitted process in the Scheduled Processes work area using this process ID.

Related Topics

- Overview of Collecting Resources and the Resource Availability
- Collection Job Set

Collect Resources and the Resource Availability from an External Source

This topic provides the procedure for collecting resources and the resource availability from Oracle E-Business Suite or a third-party system.

Import Templates for Collecting Resources and the Resource Availability

When you're collecting resources and the resource availability from Oracle E-Business Suite or a third-party system, you must use the following file-based data import (FBDI) templates:

- Supply Chain Planning Resources (ScpResourcesImportTemplate.xlsm): Use this import template to specify the resources and resource shifts.

  During the collections process, the information in the import template is used for generating the resource availability.

  Note the following:

  - The Unit of Measure Code column on the WorkCenterResources_ worksheet must specify a unit of measure (UOM) that's based on hours or units.
  - If the resource availability is calculated in hours, then the UOM for hours specified in the MSC_HOUR_UOM profile option code must be specified in the Unit of Measure Code column.

    For 24-hour availability, you can enter **Yes** in the Available 24 Hours Indicator column on the WorkCenterResources_ worksheet to avoid loading the resource availability for each hour of every day of your plan.
  - For hour-based resources, you can use the ResourceShifts_ worksheet to define the shifts. The information for shifts is considered along with the applicable organization calendars for calculation of the resource availability.

    If you don't have shifts for your hour-based resources, you don't have to enter information on the ResourceShifts_ worksheet. In this case, you'll enter information on only the WorkCenterResources_ worksheet, and the resources will be considered as being available for 24 hours a day.
  - If the resource availability is calculated in units, then the UOM for units specified in the MSC_DEFAULT_UNIT_UOM profile option code must be specified in the Unit of Measure Code column.

    The Available 24 Hours Indicator column should be set to Yes, and values must also be entered in the Capacity Units and Run Rate columns on the WorkCenterResources_ worksheet. The value entered in the Run Rate column becomes the resource availability for a resource.

    Otherwise, the resource availability won't be calculated.

- Supply Chain Planning Resource Availability (ScpResourceAvailabilityImportTemplate.xlsm): Optionally, use this import template to calculate the resource availability through multiplication of the values in the Capacity Units and Availability columns on the ResourceAvailability_ worksheet.

  When this import template is used, the resource availability isn't generated during the collections process on the basis of the information in the import template named Supply Chain Planning Resources.

  You can also use the import template named Supply Chain Planning Resource Availability to override the generated resource availability when it has some problem.

After you enter data in the import templates, generate the comma-separated values (.csv extension) files, and place them in a compressed file (.zip extension). Then, use the File Import and Export page to import the compressed file to the scm/planningDataLoader/import account on the Oracle WebCenter Content server.

Methods for Collecting Resources and the Resource Availability with the Import Templates

You must collect resources and the resource availability for Oracle E-Business Suite or a third-party system using the **Load Planning Data from Flat Files** scheduled process. You can submit the scheduled process from the following:

- Load Planning Data from Files dialog box that you open from the work area for your module in Oracle Fusion Cloud Supply Chain Planning
- Scheduled Processes work area

You can collect resources and the resource availability separately or with other reference, demand planning data, and supply planning data entities.

1. To submit the scheduled process through the Load Planning Data from Files dialog box, follow these steps:
    a. In the work area for your module in Oracle Supply Chain Planning, on the Tasks panel tab, in Plan Inputs, click **Load Planning Data from Files**.

       The Load Planning Data from Files dialog box opens.
    b. On the Parameters tab, select the source system.
    c. Select the collection type.
    d. In **Data File**, select the compressed file that you previously uploaded to the scm/planningDataLoader/import account on the WebCenter Content server.
    e. In **Enable Organization Group Collection**, select **No**.

       In **Organization Group**, don't select any value.

       If any organization group is applied, the data for resources won't be collected.
    f. Select or enter values in the remaining fields according to your requirement.
    g. Click the **Advanced** button.

       The Schedule and Notification tabs are displayed.
    h. On the Schedule tab, to collect resources and the resource availability immediately, select **As soon as possible**.

       To collect resources and the resource availability according to a schedule, select **Using a schedule**, and specify values in the fields that appear.
    i. On the Notification tab, to receive information about the scheduled process after it's submitted, select or create a notification.
    j. Click **Submit**.

       A dialog box with the ID of the submitted scheduled process is displayed. Using this process ID, you can query the status of the submitted process in the Scheduled Processes work area.

2. To submit the scheduled process through the Scheduled Processes work area, follow these steps:
    a. Click **Navigator** > **Tools** > **Scheduled Processes**.
       The Overview page in the Scheduled Processes work area opens.
    b. Click **Schedule New Process**.
       The Schedule New Process dialog box opens.
    c. Click **Job**.
    d. Search for the **Load Planning Data from Flat Files** scheduled process, select it, and click **OK**.
       The Process Details dialog box opens.
    e. On the Parameters tab, select the source system.
    f. Select the collection type.
    g. In **Data File**, select the compressed file that you previously uploaded to the scm/planningDataLoader/import account on the WebCenter Content server.
    h. In **Enable Organization Group Collection**, select **No**.
       In **Organization Group**, don't select any value.
       If any organization group is applied, the data for resources won't be collected.
    i. Select or enter values in the remaining fields according to your requirement.
    j. Click the **Advanced** button.
       The Schedule and Notification tabs are displayed.
    k. On the Schedule tab, to collect resources and the resource availability immediately, select **As soon as possible**.
       To collect resources and the resource availability according to a schedule, select **Using a schedule**, and specify values in the fields that appear.
    l. On the Notification tab, to receive information about the scheduled process after it's submitted, select or create a notification.
    m. Click **Submit**.
       A dialog box with the ID of the submitted scheduled process is displayed. Using this process ID, you can query the status of the submitted process in the Scheduled Processes work area.

Related Topics

- Overview of Collecting Resources and the Resource Availability
- Profile Option Codes and the Collection of Resources and the Resource Availability
- Import Templates Used to Create CSV Files for Oracle Supply Chain Planning
- Load Planning Data from Flat Files

Profile Option Codes and the Collection of Resources and the Resource Availability

This topic explains how the collection of resources and the resource availability for modules of Oracle Fusion Cloud Supply Chain Planning is affected by the use of profile option codes.

Note these points about the use of profile option codes while you collect resources and the resource availability:

- When resources are based on hours, you must define the applicable unit of measure (UOM) for hours using the MSC_HOUR_UOM profile option code. Examples of hour-based UOMs are Hour and HRS.

  When you're collecting resources and the resource availability from Oracle Fusion Cloud Manufacturing, if the profile value for MSC_HOUR_UOM isn't set, the profile value set for the ORA_RCS_HOUR_UOM profile option code in Oracle Manufacturing is considered.

  When you're collecting resources and the resource availability from Oracle E-Business Suite or a third-party system, you must set the profile value for MSC_HOUR_UOM.

  The UOM you set for the profile value of MSC_HOUR_UOM or ORA_RCS_HOUR_UOM should belong to the UOM class specified in the administrator profile option code called RCS_DEFAULT_UOM_CLASS_CODE_FOR_SVC_DURATION.
- When resources are based on units, you must define the applicable UOM for units using the MSC_DEFAULT_UNIT_UOM profile option code. Examples of unit-based UOMs are EA and Each.

  If you're not collecting unit-based resources, ensure that the profile value for MSC_DEFAULT_UNIT_UOM isn't defined.
- If your resources are using a UOM that's different from the profile value defined for MSC_HOUR_UOM/ ORA_RCS_HOUR_UOM or MSC_DEFAULT_UNIT_UOM, you've to define a conversion between the base UOM of the UOM class associated with the profile value and the UOM that your resources are using.
  - If you're collecting resources and the resource availability from Oracle Manufacturing, you'll use the **Manage UOM Standard Conversions** task in the Setup and Maintenance work area to define the conversion.
  - If you're collecting resources and the resource availability from Oracle E-Business Suite or a third-party system, you'll define the conversion using the file-based data import (FBDI) template named Supply Chain Planning Units of Measure (ScpUOMImportTemplate.xlsm).
- No conversion is possible between hour-based and unit-based UOMs.
- Don't enter the same profile value for MSC_HOUR_UOM and MSC_DEFAULT_UNIT_UOM. Otherwise, the resource availability for unit-based resources will also be generated in hours, and the generated information will be incorrect. For example, don't select the HRS profile option for both profile option codes.

  The profile value for ORA_RCS_HOUR_UOM shouldn't also match the profile value for MSC_DEFAULT_UNIT_UOM.

Related Topics

- Overview of Collecting Resources and the Resource Availability

Derivation of Supply Information from Transfer Orders

Derivation of Supply Information for Transfer Orders from Sales Order Fulfillment Lines During Collections

During collections from an Oracle Fusion source system, you can ensure that the supply information in your transfer orders is updated with reference to the corresponding sales order fulfillment lines.

When Oracle Inventory Management is interfaced with Oracle Order Management, transfer orders in Inventory Management will not reflect the latest information for the corresponding sales order fulfillment lines in Order Management. For example, the requested ship date for the transfer order might be different from the scheduled ship date for the sales order fulfillment line, or the shipping method for the transfer order might be different from that for the sales order fulfillment line. During collections for Oracle Fusion Cloud Supply Chain Planning, the collected transfer orders are updated with the latest supply information from the corresponding sales order fulfillment lines. The latest information for the transfer orders is taken from the sales order fulfillment lines rather than the original transfer orders in Inventory Management.

For example, you can derive the following:

- The ship date for the transfer order from the scheduled ship date for the sales order fulfillment line
- The expected delivery date or need-by date for the transfer order from the scheduled arrival date for the sales order fulfillment line
- The shipping method and source organization for the transfer order from the sales order fulfillment line

> **Note:** When you're loading data using the scheduled process named **Load Planning Data from Flat Files**, the information you provide in the file-based data import (FBDI) templates creates the required links to ensure that your loaded transfer orders are updated with the latest supply information from the corresponding sales order fulfillment lines.

Note these points about this feature:

- This feature is compatible with targeted and net change collections. You can use collection filters and templates with this feature.
  The feature supports demand and supply (constrained and unconstrained), replenishment, sales and operations, and supply (constrained and unconstrained) plans and can be used with Oracle Backlog Management and Oracle Global Order Promising.
- Both inventory destination and expense destination transfer orders are supported.
- For a demand and supply, replenishment, or supply plan, when you release reschedule recommendations for transfer orders, the scheduled ship dates and scheduled arrival dates of the corresponding sales order fulfillment lines are updated in Order Management. When you subsequently perform collections, these updated dates will be picked up, and the supply information for the collected transfer orders is updated.

  > **Note:** When transfer orders are rescheduled, and supply information is derived from the sales order fulfillment lines, ensure that both the source and destination organizations are selected as level members in the Plan organizations section on the Scope tab in the Plan definition step in the guided process for creating or editing the plan. Otherwise, the transfer orders won't be released.

- Supply information is updated for only those transfer orders that are in the open status or have open quantities that are yet to be fulfilled.
  Once a transfer order is completely shipped, the corresponding sales order fulfillment line is closed and won't be referenced any more. In the case of a partial shipment, the supply information for the quantity that's yet to be shipped is still derived from the sales order fulfillment line.
- To use this feature, you must select the checkboxes for reservations, sales orders, and transfer orders in the Supply data step in the guided process for collecting planning data.
  Otherwise, the supply information for transfer orders won't be derived from the sales order fulfillment lines.
- If the sales order fulfillment line for a transfer order is split into multiple lines, then the collected transfer order will also be correspondingly split to match the sales order fulfillment lines.
- The derived transfer orders will display quantities in the unit of measure (UOM) used by the sales order fulfillment lines.
- For transfer orders for which the supply information is derived from sales order fulfillment lines, in the Order Status column in the Supplies and Demands table, the value will be Interfaced to Order Management. Also, the transfer order demand will continue to consume the forecast in the source organization.
- If the supply information can't be derived from the sales order fulfillment line for a transfer order, then a warning will be included in the log file for the collections process.

Sources for Derivation of Transfer Order Attributes

This table lists the sources for derivation of critical attributes for transfer orders:

Attribute in Transfer Order	Source for Derivation
Destination organization	Transfer order line
Expected delivery date or need-by date	Scheduled arrival date in sales order fulfillment line
Firm status	Transfer order line
Item	Transfer order line
Line number for transfer order	Number of transfer order line and number of sales order fulfillment line The format for the line number for the transfer order is <number of transfer order line>.<number of sales order fulfillment line>. For example, for transfer order lines 1 and 2 in Inventory Management, if the sales order fulfillment line in Order Management for the second transfer order line is split, then the line numbers for the transfer orders derived after collections will be 1.1, 2.1, and 2.2.
Planning attributes	Transfer order line
Ship date	Scheduled ship date in sales order fulfillment line
Shipping method	Sales order fulfillment line
Source organization	Sales order fulfillment line
Subinventory code for destination organization	Transfer order line
Subinventory code for source organization	Transfer order line This value is provided only when the subinventory for the source organization of the transfer order exists and matches the shipping organization of the sales order.

Attribute in Transfer Order	Source for Derivation
Transfer order number	Header number for transfer order
Transfer price	Transfer order line
UOM	Primary UOM for the item in the destination organization

Limitations of the Feature

This feature is limited to transfer orders that are interfaced with Order Management.

The feature doesn't cover transfer orders that are interfaced with Oracle Shipping, and the supply information for such transfer orders will continue to be collected from Inventory Management. Reschedule and cancel recommendations for such transfer orders aren't affected by this feature and are released to Inventory Management. These transfer orders can be collected from the Oracle Fusion source system or loaded through the import templates.

Related Topics

- Examples for Deriving Supply Information for Transfer Orders from Sales Order Fulfillment Lines During Collections

Examples for Deriving Supply Information for Transfer Orders from Sales Order Fulfillment Lines During Collections

This topic provides examples of how supply information is derived for transfer orders from sales order fulfillment lines during collections from an Oracle Fusion source system.

Example 1: Scheduled Ship Date Is Different from Requested Ship Date

In this example, the scheduled ship date is different from the requested ship date for the sales order fulfillment line that's created by Oracle Order Management for a transfer order in Oracle Inventory Management. After the collections, the ship date, dock date, and due date are updated for the collected transfer order. The in-transit lead time is 2 days.

This table provides information for the transfer order in Inventory Management:

Item	Header	Line	Quantity	Expected Delivery Date	Source Organization	Destination Organization	Shipping Method
AS7311	TO1	1	10	Day 10	M2	M1	ABC-2Day

This table provides information for the sales order fulfillment line in Order Management:

Item	Sales Order	Line	Quantity	Fulfillment Line	Shipping Warehouse	Requested Ship Date	Scheduled Ship Date	Shipping Method
AS7311	SO1	1	10	1	M2	Day 8	Day 12	ABC-2Day

The requested ship date is Day 8, but the scheduled ship date is Day 12.

This table provides the details of the collected transfer order and sales order fulfillment line in Oracle Fusion Cloud Supply Chain Planning:

Item	Organizati	Source Organizati	Order Type	Order Number	Line	Fulfillmen Line	Due Date	Dock Date	Ship Date	Quantity	Shipping Method
AS7311	M1	M2	Transfer order	TO1	1.1	NA	Day 14	Day 14	Day 12	10	ABC-2Day
AS7311	M2	NA	Sales order	SO1	1	1	Day 12	NA	NA	–10	ABC-2Day

The due date and dock date for the collected transfer order have been adjusted after allowing for the 2-day shipping method to reflect the changed scheduled ship date of Day 12 for the sales order fulfillment line in Order Management.

Example 2: Shipping Method Changed in Sales Order

In this example, the shipping method is different in the sales order fulfillment line that's created by Order Management for a transfer order in Inventory Management. After the collections, the ship date, dock date, and due date are updated for the collected transfer order. The in-transit lead time is 2 days for the transfer order and 3 days for the sales order fulfillment line.

This table provides information for the transfer order in Inventory Management:

Item	Header	Line	Quantity	Expected Delivery Date	Source Organization	Destination Organization	Shipping Method
AS7312	TO1	1	10	Day 10	M2	M1	ABC-2Day

This table provides information for the sales order fulfillment line in Order Management:

Item	Sales Order	Line	Quantity	Fulfillment Line	Shipping Warehouse	Requested Ship Date	Scheduled Ship Date	Shipping Method
AS7312	SO1	1	10	1	M2	Day 8	Day 13	DEF-3Day

The requested ship date is Day 8, but the scheduled ship date is Day 13. The shipping method has been changed from ABC-2Day to DEF-3Day.

This table provides the details of the collected transfer order and sales order fulfillment line in Oracle Supply Chain Planning:

Item	Organizati	Source Organizati	Order Type	Order Number	Line	Fulfillmen Line	Due Date	Dock Date	Ship Date	Quantity	Shipping Method
AS7312	M1	M2	Transfer order	TO1	1.1	NA	Day 16	Day 16	Day 13	10	DEF-3Day
AS7312	M2	NA	Sales order	SO1	1	1	Day 13	NA	NA	–10	DEF-3Day

The shipping method has been changed for the collected transfer order. The due date and dock date for the collected transfer order have been adjusted after allowing for the 3-day shipping method to reflect the changed scheduled ship date of Day 13 for the sales order fulfillment line in Order Management.

Example 3: Sales Order Fulfillment Lines Are Split

In this example, for a transfer order in Inventory Management, separate sales order fulfillment lines with different scheduled ship dates are created in Order Management. After the collections, three transfer orders are collected that align with each open sales order fulfillment line. The ship dates, dock dates, and due dates are updated for the collected transfer orders. The in-transit lead time is 2 days.

This table provides information for the transfer order in Inventory Management:

Item	Header	Line	Quantity	Expected Delivery Date	Source Organization	Destination Organization	Shipping Method	Requested Quantity
AS7313	TO1	1	10	Day 10	M2	M1	ABC-2Day	10

This table provides information for the sales order fulfillment lines in Order Management:

Item	Sales Order	Line	Quantity	Fulfillment Line	Shipping Warehouse	Requested Ship Date	Scheduled Ship Date	Shipping Method	Status
AS7313	SO1	1	3	1	M2	Day 8	Day 12	ABC-2Day	Awaiting Shipping
AS7313	SO1	1	5	2	M2	Day 8	Day 16	ABC-2Day	Awaiting Shipping
AS7313	SO1	1	2	3	M2	Day 8	Day 18	ABC-2Day	Awaiting Shipping

The requested ship date is Day 8, but the scheduled ship dates are Day 12, Day 16, and Day 18.

This table provides the details of the collected transfer orders and sales order fulfillment lines in Oracle Supply Chain Planning:

Item	Organizati	Source Organizati	Order Type	Order Number	Line	Fulfillmen Line	Due Date	Dock Date	Ship Date	Quantity	Shipping Method
AS7313	M1	M2	Transfer order	TO1	1.1	NA	Day 14	Day 14	Day 12	3	ABC-2Day
AS7313	M1	M2	Transfer order	TO1	1.2	NA	Day 18	Day 18	Day 16	5	ABC-2Day
AS7313	M1	M2	Transfer order	TO1	1.3	NA	Day 20	Day 20	Day 18	2	ABC-2Day
AS7313	M2	NA	Sales order	SO1	1	1	Day 12	NA	NA	–3	ABC-2Day
AS7313	M2	NA	Sales order	SO1	1	2	Day 16	NA	NA	–5	ABC-2Day

Item	Organizati	Source Organizati	Order Type	Order Number	Line	Fulfillmen Line	Due Date	Dock Date	Ship Date	Quantity	Shipping Method
AS7313	M2	NA	Sales order	SO1	1	3	Day 18	NA	NA	–2	ABC-2Day

The due dates and dock dates for the collected transfer orders have been adjusted after allowing for the 2-day shipping method to reflect the changed scheduled ship dates of Day 12, Day 16, and Day 18 for the sales order fulfillment lines in Order Management.

Example 4: Sales Order Fulfillment Line Is Partially Shipped

In this example, the sales order fulfillment line that's created by Order Management for a transfer order in Inventory Management is partially shipped. After the partial shipment, two sales order fulfillment lines are created, one for the shipped units and the other for the units that are awaiting shipment. After the collections, the ship dates, dock dates, and due dates are updated for the collected transfer orders. The in-transit lead time is 2 days.

This table provides information for the transfer order in Inventory Management:

Item	Header	Line	Quantity	Expected Delivery Date	Source Organization	Destination Organization	Shipping Method
AS714	TO1	1	10	Day 10	M2	M1	ABC-2Day

This table provides information for the sales order fulfillment line in Order Management:

Item	Sales Order	Line	Quantity	Fulfillment Line	Shipping Warehouse	Requested Ship Date	Scheduled Ship Date	Shipping Method
AS7314	SO1	1	10	1	M2	Day 8	Day 12	ABC-2Day

The requested ship date is Day 8, but the scheduled ship date is Day 12.

This table provides the details of the transfer order after the partial shipment:

Item	Header	Line	Quantity	Expected Delivery Date	Source Organizatior	Destination Organizatior	Shipping Method	Requested Quantity	Shipped Quantity
AS714	TO1	1	10	Day 10	M2	M1	ABC-2Day	10	4

This table provides information for the sales order fulfillment lines in Order Management after the partial shipment:

Item	Sales Order	Line	Quantity	Fulfillment Line	Shipping Warehouse	Requested Ship Date	Scheduled Ship Date	Shipping Method	Status
AS7314	SO1	1	4	1	M2	Day 8	Day 12	ABC-2Day	Shipped
AS7314	SO1	1	6	2	M2	Day 8	Day 16	ABC-2Day	Awaiting Shipping

For the sales order fulfillment line that's awaiting shipping, the requested ship date is Day 8, but the scheduled ship date is Day 16.

This table provides the details of the collected transfer orders and sales order fulfillment lines in Oracle Supply Chain Planning:

Item	Organizat	Source Organizat	Order Type	Order Number	Line	Fulfillmer Line	Due Date	Dock Date	Ship Date	Quantity	Complete Quantity	Shipping Method
AS7314	M1	M2	Transfer order	TO1	1.2	NA	Day 18	Day 18	Day 16	6	NA	ABC-2Day
AS7314	M1	M2	In-Transit Shipment	TO1	1	NA	Day 14	Day 14	Day 12	4	NA	ABC-2Day
AS7314	M2	NA	Sales order	SO1	1	1	Day 12	NA	NA	0	4	ABC-2Day
AS7314	M2	NA	Sales order	SO1	1	2	Day 16	NA	NA	–6	NA	ABC-2Day

The due dates and dock dates for the collected transfer orders have been adjusted after allowing for the 2-day shipping method to reflect the changed scheduled ship dates of Day 12 and Day 16 for the sales order fulfillment lines in Order Management.

Related Topics

- Derivation of Supply Information for Transfer Orders from Sales Order Fulfillment Lines During Collections

Collection or Loading of Historical Receipt Transactions

You can collect historical receipt transactions from Oracle Fusion Cloud Inventory Management. You can also load historical receipt transactions into your planning repository from external sources, such as legacy or third-party applications.

Note these points about how historical receipt transactions are collected or loaded:

- To collect historical receipt transactions from Oracle Inventory Management, in the Demand data step in the guided process for collecting planning data, in the section for collecting receipts history, you must select the **Collect receipts history for organizations** and **Collect receipts history for subinventories** checkboxes.

  The duration for collecting historical receipt transactions from Oracle Inventory Management is determined by your selections in the section for the collection time frame in the Demand data step in the guided process.

  > **Note:** If you intend to use a policy assignment set in Oracle Replenishment Planning for periodic automated replenishment (PAR), you don't need to collect the receipts history for organizations. Replenishment Planning calculates PAR policies for only item-subinventory combinations and eventually publishes these policies to Oracle Inventory Management. For more information, see the topic titled *PAR Policies*.

- To load historical inventory transactions from external sources into the planning repository, use the file-based data import (FBDI) template named Supply Chain Planning Measures (ScpMeasuresImportTemplate.xlsm). Then, run the scheduled process named **Load Planning Data from Flat Files**.

In the dialog box for the scheduled process, you can use the **Number of Days Before Today** and **Number of Days After Today** fields to set the duration for collecting historical receipt transactions.

- These predefined measures are available for storing historical receipt transactions:
  - Receipts History: This measure contains the loaded or collected receipt transactions. The value is presented as a quantity.

    When you're using the import template named Supply Chain Planning Measures, you must select this measure in the Measure Name column.
  - Adjusted Receipts History: This editable measure contains your override of the value in the Receipts History measure. The value is presented as a quantity.
  - Final Receipts History: This calculated measure contains the value of the Adjusted Receipts History measure if it has been updated. Otherwise, the Final Receipts History measure returns the value of the Receipts History measure.

    These measures are contained in the predefined measure group named Receipts-Based Forecasting.
- When you're collecting data from Oracle Inventory Management, you can collect historical receipt transactions for only those items for which the planning method is Replenishment Planning in Oracle Fusion Cloud Product Lifecycle Management.

  When you're loading data from external sources, you can load historical receipt transactions for only those items that you previously loaded using the import template named Supply Chain Planning Items (ScpItemImportTemplate.xlsm), and for which 10 (Replenishment planning) is specified in the Planning Method column.
- When you're collecting data from Oracle Inventory Management, you can collect historical receipt transactions for only those subinventories that belong to organizations that are enabled for subinventory planning. On the Organizations tab on the Supply Network Model page, **Yes** must be selected in the Plan Subinventories column for these organizations.

  When you're loading data from external sources, you can load historical receipt transactions for only those organizations that you previously loaded using the import template named Supply Chain Planning Organizations (ScpOrganizationImportTemplate.xlsm), and for which Yes is specified in the Plan Subinventories column on the Organization_tab.

Historical Receipt Transactions Collected from Oracle Inventory Management

In the Demand data step of the guided process for collecting planning data, when you select the **Collect receipts history for organizations** checkbox, historical receipt transactions are collected from Oracle Inventory Management as listed in this table:

Transaction Action	Transaction Source	Transaction Type
Receipt into Stores	Account	Account Receipt
Receipt into Stores	Account Alias	Account Alias Receipt
Receipt into Stores	Inventory	Miscellaneous Receipt
Receipt into Stores	Movement Request	Movement Request Put Away
Receipt into Stores	Purchase Order	Purchase Order Receipt

Transaction Action	Transaction Source	Transaction Type
Direct Organization Transfer	Inventory	Direct Organization Transfer
Intransit Receipt	Inventory	Intransit Receipt
Intransit Receipt	Transfer Order	Transfer Order Interorganization Receipt

In the Demand data step of the guided process for collecting planning data, when you select the **Collect receipts history for subinventories** checkbox, historical receipt transactions are collected from Oracle Inventory Management as listed in this table:

Transaction Action	Transaction Source	Transaction Type
Receipt into Stores	Account	Account Receipt
Receipt into Stores	Account Alias	Account Alias Receipt
Receipt into Stores	Inventory	Miscellaneous Receipt
Receipt into Stores	Movement Request	Movement Request Put Away
Receipt into Stores	Purchase Order	Purchase Order Receipt
Subinventory Transfer	Inventory	Subinventory Transfer
Subinventory Transfer	Movement Request	Movement Request Transfer
Subinventory Transfer	Transfer Order	Transfer Order Intraorganization Transfer
Direct Organization Transfer	Inventory	Direct Organization Transfer
Intransit Receipt	Inventory	Intransit Receipt
Intransit Receipt	Transfer Order	Transfer Order Interorganization Receipt
Intraorganization Intransit Receipt	Transfer Order	Transfer Order Intraorganization Receipt

Related Topics

- Collect Data Using the Targeted Collection Type
- Load Planning Data from Files

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	• 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	• Items • Organizations • Catalogs
Oracle Cost Management, Oracle Order Management, and others	• 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

Transaction Action	Transaction Source	Transaction Type
In-transit shipment	Transfer Order Return	Transfer Order Return Shipment
Issue from stores	Purchase Order	Return to Supplier
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.xlsm) 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 WebCenter Content 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 WebCenter Content 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: o 1 denotes Targeted Collection type

Scheduled Process Internal Parameter	Maps to the displayed parameter of this process	Expected Value	Parameter Details
			○ 2 denotes Net change Collection type
Parameter 3	Data File	Zip File name	Name of the zip file to be uploaded.
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 Oracle WebCenter Content . 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: `SELECT instance_id FROM msc_apps_instances WHERE instance_code = '<instance code>'`
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: `SELECT apps_ver FROM msc_apps_instances WHERE instance_code = '<instance code>'`
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

Scheduled Process Internal Parameter	Maps to the displayed parameter of this process	Expected Value	Parameter Details
			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 WebCenter Content

The uploadfiletoUCM operation uploads a file to the WebCenter Content 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

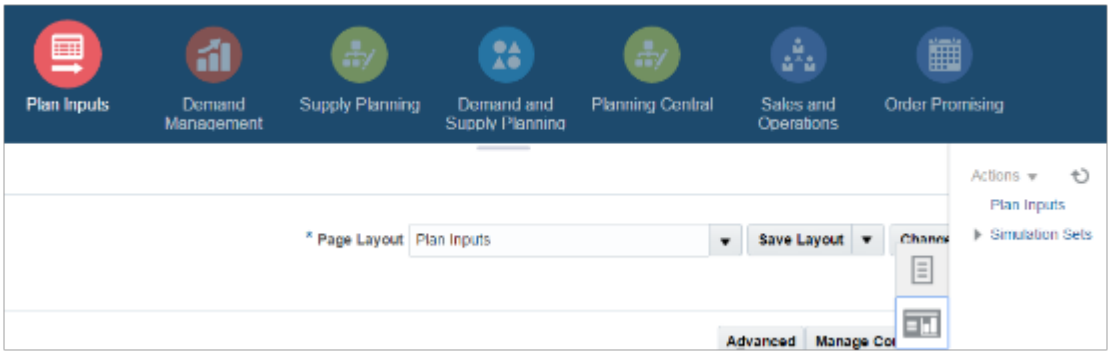
- Supply data
- Demand data

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	You must select a source system. • 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	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.

Parameter	Notes

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	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: • 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	You must select a source system. • 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	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. • 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.

Parameter	Notes
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.

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 MSC_MEASURE_DATA and don't have error information.
- The table filters records by the applicable security privileges of the user. For example, if you've 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 (ScpBookingHistoryImportTemplate.xlsm)
  - Supply Chain Planning Causal Factors (ScpCausalFactorsImportTemplate.xlsm)
  - Supply Chain Planning Forecast Measures (ScpForecastMeasureImportTemplate.xlsm)
  - Supply Chain Planning Measures (ScpMeasuresImportTemplate.xlsm)
  - Supply Chain Planning Option Bookings History (ScpOptionBookingHistoryImportTemplate.xlsm)
  - Supply Chain Planning Option Shipments History (ScpOptionShipmentHistoryImportTemplate.xlsm)
  - Supply Chain Planning Shipments History (ScpShipmentHistoryImportTemplate.xlsm)
- The table doesn't display measure data that's imported through the import templates named Supply Chain Planning External Forecasts (ScpExternalForecastImportTemplate.xlsm) and Supply Chain Planning Price Lists (ScpPriceListImportTemplate.xlsm).

  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 or loaded from Oracle E-Business Suite.
- For demand, demand and supply, and sales and operations plans in which you're using the functionality for aggregating data for non-key customers, for aggregated records, the value displayed in the Customer column is <zone name>:All Other or Default:<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

- Overview of Aggregating Data for Non-Key Customers

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

    After you create and define a measure catalog, you can select the measure catalog for a plan from the Edit Plan Options page.
4. Click the Levels and Attributes tab and select the desired dimension and hierarchy.
    a. In the **Dimension** list, select a dimension.
    b. Optionally, in the **Hierarchy** list, select a hierarchy.
    c. Click the **Search** icon button.
    d. To change how the level name appears in pivot tables and graphs, select the row and enter the level name in the **Level Name to Display** field.

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

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

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 default Product catalog is populated into the Product hierarchy.

If you haven't set up the default Product 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.

For information on setting up the default Product catalog, see the topic titled *Guidelines for Setting Up Catalogs for Collections*

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	• Default Demand and Supply Catalog • Default Demand Management Catalog • Default Supply Planning Catalog • Supersession Forecasting Catalog
Demand Management	• Default Demand Management Catalog • Supersession Forecasting Catalog
Planning Central	• Default Demand and Supply Catalog • Default Demand Management Catalog • Default Planning Central Catalog

Work Area	Predefined Measure Catalogs
	• Default Supply Planning Catalog
Replenishment Planning	• Default Replenishment Planning Archive Catalog • Default Replenishment Planning Catalog • Incremental Replenishment Planning Default Catalog • Supersession Forecasting Catalog
Sales and Operations Planning	• 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

    > **Note:** You can't use user-defined hierarchies for the Customer dimension in a demand, demand and supply, or sales and operations plan in which you're using the functionality for aggregating data for non-key customers.

  - 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.
- Change 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.xlsm), 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):

   - 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).
   - 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).
   - 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.xlsm).

   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: • 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: • Manufacturing and Supply Chain Materials Management • Supply Chain Planning Features to enable: • Project-Driven Supply Chain • Plan Project-Specific Supply **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.

Scenario	How to Enable
Your enterprise doesn't use Oracle Supply Chain Execution Cloud.	Use the offering: Supply Chain Planning Features to enable: • 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