Oracle
SCM Cloud
Using Planning Central

Release 13 (update 18B)
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Preface

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

Using Oracle Applications

Using Applications Help

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

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

You can also read Using Applications Help.

Additional Resources

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

- Guides and Videos: Go to the Oracle Help Center to find guides and videos.

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

Conventions

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

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

Documentation Accessibility

For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website.

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.
Contacting Oracle

Access to Oracle Support

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Comments and Suggestions

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

The Planning Central Business Flows: Explained

You use Oracle Fusion Planning Central, a modern planning cloud solution, to run business flows to transform demand to supply.

You can perform the following in the Planning Central work area:

- Process data collection, demand planning, inventory planning, and supply planning.
  
  If you choose Demand and Supply as the plan type, Demand planning, Inventory planning and Supply planning can be a single step.

- Automate the entire sequence of planning processes or run a subset of the processes.

- Analyze and adjust your data at any stage.

The following figure illustrates the Planning Central business flow steps.
Data Collection
Data collection is the first step of the planning business flow. You can collect and transform the data from various Oracle Supply Chain Management cloud applications to the Planning Central schema.

The data that you collect can be of three types:

- Master data: Primarily sourced from Oracle Supply Chain Management cloud.
- Demand data: Two potential sources of demand data are sales orders that flow from the Oracle Order Management cloud and the shipment history from the Oracle Materials Management cloud.
- Supply data: The supply data are collected from three sources:
  - Oracle Inventory Management cloud
  - Oracle Manufacturing cloud
  - Oracle Purchasing cloud

Demand Planning
Using demand plans you can run the statistical forecasting processes to generate demand projections. You can also compare the statistical forecasts with sales forecasts.

Planning Central's forecasting engine supports the following forecasting methods:

- Holt
- Regression
- Transformation Model (Log)
- Regression for Intermittent
- Croston for Intermittent
- Modified Ridge Regression

Planning Central’s forecasting can handle many common demand planning requirements, including:

- Forecast bookings and shipments based on historical demand.
- Provide accuracy metrics.
- Generate inputs to safety stock calculation for regular and sparse demands.
- Cleanse data (remove leading zeroes, fill in missing values, and remove outliers).
- Forecast new items.
- Sanity checking (load forecasts from an external system and compare with the Planning Central statistical forecast).

Inventory Planning
You can use inventory planning capability to calculate statistical safety stock based on the volatility of demand and stocking targets. It addresses diverse supply and demand patterns with multiple algorithms based on Mean absolute deviation in units (MAD), Mean absolute percentage error (MAPE) and arrival rate. Target service levels may be set at any dimension of the hierarchy, allowing you to segment your stocking policies by customer, channel, product family, warehouse, or other factors. Inventory can also be set manually by using mass updates when appropriate, such as when launching a product.
Supply Planning
Using supply planning you can calculate resource and material requirements based on customer and safety stock requirements, lead times, calendars, availability, and other parameters.
You can generate unconstrained supply plans, meaning that you ignore limited resource or supplier capacity, which provides the following advantages:

• Balances supply and demand and recommends new supplies as needed.
• Recommends when to reschedule or cancel a supply.
• Identifies material shortages, resource overloads, and supplier capacity overloads.
• Identifies when supplies do not have sufficient lead time (lead time compression).
• Plans your entire supply chain, including contract manufacturers.

Supply plans can model outsourced manufacturing and delivery scenarios, including drop ship and back-to-back orders. It also supports hub and spoke planning configurations, such as using an MPS plan as a demand schedule to an MRP plan.

Demand and Supply Planning
Planning Central brings together the key functional requirements of demand management, inventory planning, and supply planning to a single platform and then links the planning processes to execution systems.
Using a demand and supply planning processes you can do the following:

• Generate demand forecasts and consume against actual sales orders.
• Calculate statistical safety stock requirements.
• Plan supply (work orders, material transfers, and purchases) to fulfill demand and manage inventory.
• Release planned orders for execution.

Plan Execution
You can share the order recommendations and save the plan to drive execution.
By default, Planning Central is integrated with other Oracle SCM cloud application. During the plan execution, the integration helps in the following:

• Automatically releases planned orders and reschedules of existing supplies.
• Manually releases groups of orders when necessary.
• Manages changes and cancellations.
• Manage back-to-back and drop ship orders.

Planners can set up automatic release rules or release orders manually.

Supply Chain Planning Work Areas: Explained
The Oracle Supply Chain Planning Cloud solution is comprised of products designed for specific supply chain planning business processes and tasks. You perform these processes and tasks using work areas. Each of the Supply Chain Planning products provides access to one or more work areas.
The Supply Chain Planning work areas that you can use are determined by these factors:

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

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

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

Navigation to Work Areas

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

- From the Navigator: You click the Navigator icon to see the work areas you have access to. The Supply Chain Planning work areas are listed within the Supply Chain Planning heading. The work area names are links. You click a specific work area link to access that work area.

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

List of Supply Chain Planning Work Areas

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

<table>
<thead>
<tr>
<th>Work Area</th>
<th>Products</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order Promising</td>
<td>Oracle Fusion Global Order Promising</td>
</tr>
<tr>
<td>Demand Management</td>
<td>Oracle Fusion Demand Management</td>
</tr>
<tr>
<td>Supply Planning</td>
<td>Oracle Fusion Supply Planning</td>
</tr>
<tr>
<td>Demand and Supply Planning</td>
<td>Both of these products must be configured:</td>
</tr>
<tr>
<td></td>
<td>• Oracle Fusion Demand Management</td>
</tr>
<tr>
<td></td>
<td>• Oracle Fusion Supply Planning</td>
</tr>
<tr>
<td>Planning Central</td>
<td>Oracle Fusion Planning Central</td>
</tr>
<tr>
<td>Sales and Operations Planning</td>
<td>Oracle Fusion Sales and Operations Planning</td>
</tr>
<tr>
<td>Plan Inputs</td>
<td>You can use the Plan Inputs work area to perform tasks that do not require creating or accessing a plan. This work area is applicable to these products, in addition to the product-specific work areas:</td>
</tr>
<tr>
<td></td>
<td>• Oracle Fusion Demand Management</td>
</tr>
</tbody>
</table>
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<table>
<thead>
<tr>
<th>Work Area</th>
<th>Products</th>
</tr>
</thead>
</table>
|           | • Oracle Fusion Supply Planning  
|           | • Oracle Fusion Planning Central 
|           | • Oracle Fusion Sales and Operations Planning  
|           | • Oracle Fusion Global Order Promising |

Related Topics

- The Supply Planning Work Area: Explained
- The Demand Management Work Area: Explained
- The Sales and Operations Planning Work Area: Explained
- The Order Promising Work Area: Explained

The Planning Central Work Area: Explained

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

You can use the Planning Central work area to do the following:

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

To access the Planning Central work area and open a plan:

1. In the Navigator, click the Planning Central work area link.
2. Click the Plans drawer, expand Plans.
3. Right-click a plan and select Open.

By default, your plan opens on the Edit Plan page. The Edit Plan page consists of two main areas:

- Header
- Configurable pane

Header

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

Configurable Pane

You can display the content of your plan in the configurable pane area, which is located below the header. You can add multiple panes on the page to display your content. The Page Layout drop-down list in the header area determines the number of panes in your planning interface page.
Working with Page Layouts in Supply Chain Planning: Explained

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

This topic discusses the following:

- Creating a page layout
- Editing a page layout
- Managing a page layout
- Using the Plan Summary page layout

Creating a Page Layout

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

To create a page layout:

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

   This creates an empty pane page layout.
7. Click the Change drop-down list and select any layout.
   - For example, select a two pane horizontal layout.
8. Click Open and select the pane and add the content using the Open Table, Graph, or Tile Set dialog.
9. Click Save Layout.
Editing a Page Layout
You can edit an existing page layout in two ways:

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

Managing a Page Layout
Use the Manage Page Layout to perform the following:

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

Using the Plan Summary Layout
Plan Summary is a predefined page layout that contains a set of infotiles and high level graphics you can use to review the business value of a plan.

Using the Plan Summary layout, you can do the following:

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

The structure of the Plan Summary layout is a predefined set of infotiles. Using infotiles you can view the key metrics of your plan. You can further drill to the predefined analytics using the following tables or graphs:

- Revenue and margin
- Forecast comparison
- Shipments forecast MAPE
- Inventory turns
- Demand at risk
- Rescheduling exceptions
- Utilization percentage
- Excess and obsolescence
Defining Planners for Supply Chain Planning: Explained

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

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

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

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

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

Supply Chain Planning Plan Types: Explained

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

- **Demand Plan**: Use this plan type when you want to perform collaborative and statistical demand forecasting. It can also be used as a demand schedule for a supply plan. You can create a Demand Plan from the Planning Central work area and Demand Management work area only. You cannot create a Demand Plan in the Supply Planning work area.

- **Supply Plan**: Use this plan type when you want to generate a supply schedule. You can create a Supply Plan from the Planning Central work area and Supply Planning work area only. You cannot create a Supply Plan in the Demand Management work area.

- **Demand and Supply Plan**: Use this plan type when you want to perform planning and forecasting in a single plan. You can create a Demand and Supply Plan from the Planning Central work area and Demand and Supply Planning work area only.

- **Sales and Operations Plan**: Use this plan type for aggregate planning. You can create this plan from the Sales and Operations Planning work area.
Managing Plans: Explained

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

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

The following table lists the available options in the Actions menu and the description of each option.

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

**Reviewing Plan Messages: Explained**

In Supply Chain Planning, you can view root causes for technical plan process failures and the recommendations to fix the issues.
After running a plan, open the Review Plan Messages table to review the warning and error messages generated by the planning processes, such as forecast generation and supply plan generation. You can also review the recommendations to address the warning and error conditions. Access the plan messages from either the Manage Plans page or the Edit Plan page.

Plan messages are available for all plan types (for example, Supply Plan or Sales and Operations Plan types) and are accessible from your respective Supply Chain Planning work area. There are three message types:

- **Warning**: Indicates an issue that can result in a future run plan error if not resolved.
- **Error**: Indicates a plan failure.
- **Recommendation**: Indicates a recommendation to resolve a plan failure or how to achieve a better run performance.

If you repeatedly run the plan, the same messages appear on the Review Plan Messages tab for each plan run. The messages will have different process identifiers and submission times.

You can delete plan messages based on the submission date. On the Review Plan Messages tab, click the Purge button. In the Purge Messages dialog box, enter a submission date with one of the operators: Equals, Before, On or before, After, On or after, Between, or Not between.

Use the following steps to open the Review Plan Messages table from the Manage Plans page:

1. From a Supply Chain Planning work area, click the **Task** drawer and select **Manage Plans**.
2. On the Manage Plans page, search for a plan.
3. In the Search Results region, select a plan.
4. Click the **Actions** drop-down list and then select **Review Plan Messages** to access the Review Plan Messages tab.

    From the Search Results region, you can export the messages to a Microsoft Excel spreadsheet.

Use the following steps to open the Review Plan Messages table from the Edit Plans page:

1. From a Supply Chain Planning work area, click the **Task** drawer and select **Manage Plans**.
2. On the Manage Plans page, search for a plan.
3. In the Search Results region, select a plan. Next, click the **Actions** drop-down list and then select **Open**.
4. On the Edit Plan page, click **Open**.
5. In the Open Table, Graph, or Tile Set dialog box, search for the Review Plan Messages table. Select the table and then click **OK**.
6. On the Review Plan Messages tab, click the **Search** button.
7. In the Search Results region, view the plan messages.

    From the Search Results region, you can export the messages to a Microsoft Excel spreadsheet.

### Managing Notes in Supply Chain Planning: Explained

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

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

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

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

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

You also specify whether the note is private or public. Private notes are visible only to the user who created the note. Public notes are visible to all the users with whom the object is associated.

From the Demand Management or the Sales and Operations work area, you can access the Notes table to display planning level members for Product hierarchies. You can create a layout to view the Notes table as part of the layout instead of as a dialog box. The Notes table is not available for Supply Planning or Planning Central.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Notes for Exceptions

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

To create notes for an exception, do the following:

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

Related Topics

• Capturing Business Insights: Overview

Assigning Time Zones to Locations: Explained

You can view supplies and demands in your Supply Chain Planning work area based on the time zone of the organization, customer site, or supplier site. In addition, you can calculate precise in-transit time because supply chain planning considers the time zone difference between the source and destination locations.

The following points discuss in detail how you can collect time zone details and view orders depending on the locations’ time zone:

• Update Time Zones Using Data Collections
Update Time Zones Using Data Collections

Use data collections to update organizations, customer site, or supplier site time zones. You can update the time zone in one of following three ways:

- Collect the organization’s time zone from an Oracle Fusion source system.
- Collect time zones from an external source system using the organization, customer, and supplier import templates.
- Update the time zone on Customers and Suppliers tabs of the Maintain Supply Network Model page.

If you are collecting from an Oracle Fusion source system, then you can update the organization’s time zone using the data collections method only. You cannot manually update the organization’s time zone using the Maintain Supply Network Model page in your Supply Chain Planning work area.

Assign Time Zones in Supply Network Model

Before collecting time zones or converting time zones to a local time, you must first assign time zones to organizations, customer sites, and supplier sites. A new time zone field is available on the Organizations, Customers, and Suppliers tab of the Maintain Supply Network Model page in your Supply Chain Planning work area.

You cannot collect customer site and supplier site time zones from an Oracle Fusion source system. To update the customer site or supplier site time zone, use one of the following options:

- Use the customer or supplier import template to update the customer site or supplier site time zone. You can also use this template if you are collecting from an external source system.
- Update the customer site and supplier site time zones directly in the Maintain Supply Network Model page.

When you recollect new customer and supplier data from an Oracle Fusion source system, the existing customer site and supplier site time zone information is preserved. If you do not collect or update the customer site or supplier site time zone, then planning calculations assume that the customer site or supplier site is located in the same time zone as the organization that is associated with the demand or supply.

When you collect the supplies and demands, collections automatically convert the associated dates from the database server time zone (Coordinated Universal Time or UTC) to the local time zone based on where the event takes place. In addition, when you collect shipments and booking history from the Oracle Fusion source system for use in the Demand Management or the Demand and Supply Planning work area, collections converts the historical data from the database server time zone (UTC) to the associated organization's time zone.

Calculate In-Transit Time

When calculating in-transit times, supply chain planning considers the time zone difference between the shipping and receiving locations. The following example shows how supply chain planning calculates the in-transit time. In this example, the customer site is located in Sydney (UTC+10) and the shipping organization is in Sacramento, California (UTC-8).

1. When planning collects a sales order with a requested arrival date of 25-March-2018, 21:00 (UTC) on the database server, the requested arrival date is offset to the customer site's time zone. The customer site’s time zone is Sydney time zone (UTC+10 hours). The requested arrival date becomes 26-March-2018, 7:00 in plan inputs (Sydney time zone).
2. When you run the plan with the Refresh with current data option, the sales order is included in the plan and supply chain planning uses this date to calculate the scheduled ship date.

3. Consider the in-transit time for the selected shipping method (Air Freight) is 36 hours. Supply chain planning first calculates the scheduled ship date as 25-March-2018, 19:00 hours (Sydney time) and then converts the date to the Sacramento time. The product is shipped from Sacramento. The time zone difference is applied to the scheduled ship date by subtracting 18 hours. The scheduled ship date becomes 25-March-2018, 1:00 Sacramento time, which is used to generate the pegged supplies.

4. After completing the calculations, supply chain planning moves all the dates to the end of the day. All dates have the time stamp of 23:59:00. The time stamp is not available on the UI, but you can query the time stamp from the planning database.

Supply chain planning makes similar in-transit calculations when shipping supplies from a supplier site to an organization, or when transferring product from one organization to another.

View Time Zones in Supplies and Demands

On the Supplies and Demands page, use the following three columns to view supplies and demands in relation to the time zone:

- Organization Time Zone
- Source Time Zone
- Destination Time Zone

The columns are not included in any predefined table layout. Create a user-defined table layout and include these columns in your table.

To display supply and demand measure values within a table such as Material Plan or Build Plan, supply chain planning assigns the measure value to the day based on the organization's local time zone. The supply and demand measure value is not assigned to a date based on a common time zone.

Release to Execution

When you release orders that are marked for release to Oracle Cloud execution system, the release action offsets the date from the location's time zone to the database server time zone (UTC).

For example, when you release a planned make order, supply chain planning converts the need-by date from the organization's time zone to UTC.
2 Tables, Graphs, Analysis Sets, Infotiles, and Tile Sets

Managing Tables, Graphs, Analysis Sets, Infotiles, and Tile Sets Using the Selector Tool: Explained

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

The selector tool has the following tabs:

- Measures
- Hierarchies
- Members
- Layout
- Comparison Options

Following are the details of each tab:

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

The planning processes aggregate measure data from lower levels to higher levels or compute KPIs and derived calculations from other values at the same level as needed. The planning processes can also allocate or spread updates made at an aggregate level to the affected cells at lower levels. Measures can be expressed in different units of measure, such as inches, dollars, kilos, or liters. Depending on the context, you can display, update, or compare measures that are in different units. The planning processes can convert among different units and among different currencies (for monetary values).

- Hierarchies: Use the Hierarchies tab to select the dimensions, hierarchies, and levels to include or exclude in the table or graph. For each dimension, select the hierarchies and levels that you want to include in the graph or table. Checking the box in the Display column includes that dimension in the table or graph. Expand the dimension to view the available hierarchies. Expand the hierarchy to view the levels of the hierarchy. Checking a level includes it in the table or graph. If multiple levels are checked, the top level is displayed in the table or graph by default. Each
level in the table or graph can be expanded until all checked levels are visible. The Show Unassociated check box determines whether the measure values that are not associated with a specific dimension in the table or graph are hidden or displayed. For example, a table could include Shipments Forecast and Net Resource Availability. Shipments Forecast has product, organization, and time as dimensions. Net Resource Availability has resource, organization, and time as dimensions. With Show Unassociated, checked, the Resource column displays the word Unassociated when viewing Shipments Forecast rows.

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

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

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

In the Waterfall Analysis section, you can compare specific measures in a table or a graph with an archived plan. You can select the archive that you want to reference. You can include more than one selection in the Measure Archives to Use field. Select the Use MAPE calculations check box if you have scheduled your plan archival process. MAPE calculations use the system administrator archive and not an on-demand archive.

In the Trend Analysis section, you can provide the number of archives that you want to reference. The planning processes select the latest archives. For example, you have five archives, where number five is the latest archive and you have specified the Number of Previous Versions to Include as 3. The planning processes will select archive number five, four, and three for the comparison. The difference between Waterfall Analysis and Trend Analysis is that in Waterfall Analysis you can select specific archives that you want to compare. In Trend Analysis, you can select the number of archives that you want to compare and only the latest archives are used for comparison.

The Plan Comparison section pertains to both archived plans and alternate plans that you consider for comparison. You can select the type of difference to display in tables or graphs for comparison. For example, you can choose to view the difference in percentage or absolute percentage.

Using Advanced Options in the Selector Tool

You can use the advanced filter criteria to filter through data to select specific members that fulfill some criteria. You access the Advanced Filter options through the Funnel icon on the Members tab. You can access the advanced options filter criteria tools from the Members tab and then click Advanced Filter icon. You can use the following filter criteria tools:

• Levels: Select by level (Select the members in a level such as Account for the Customer dimension, or Year for the Time dimension)

• Family: Select parent or child of a dimension member (Select members based on a parent or child relationship, such as selecting the Months in a Quarter)

• Attributes: Select based on an attribute, such as name (Select members based on attribute values, such as selecting items whose name contains “Economy”)

• Measure Criteria: Select based on meeting measure criteria (Select members that meet the criteria, such as Categories where Sales is greater than Forecast)

• Time Range: Select a range of dates (Select time periods based on a range, start date, or today’s date)
The advanced filter criteria tools are used in conjunction with action keywords to refine selections. The following four actions determine how to apply the criteria:

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

Filter criteria tools can be applied sequentially to refine the selection. For example, select all the items for a category, and then keep the top 10 items based on sales.

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

The Criteria Steps area of the tab, displays the criteria applied. A step can be removed by clicking the X in the row. Click Show Criteria Change to view the result of removing the criteria.

### Creating Analysis Sets

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

Applying an existing Analysis Set to a table or graph is a quick way to select the measures and dimensions members that are frequently used.

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

### Using the Table Drilling

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

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

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

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

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

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

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

There are two tabs:

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

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

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

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

Creating a Tile Set for Supply Chain Planning: Procedure

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

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

To create a tile set:

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

Creating an Infotile for Supply Chain Planning: Procedure

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

To create an infotile:

1. In the **Navigator**, click a Supply Chain Planning work area.
2. Open a plan and then click **Actions > Manage Tables, Graphs, and Analysis Sets**.

3. In the Manage Tables, Graphs, and Analysis Sets dialog box, in the Search Results region, click **Actions** and then select **Create > Tile**.

4. In the Selector Tool - Create Tile dialog box, on the Measures tab, select the required measures and move them from the Available Measures pane to the Selected Measures pane.

5. On the Hierarchies tab, select the dimensions, hierarchies, and levels to include or exclude in the infotile.

6. On the Members tab, select the required dimension members and move them from the Available Members pane to the Selected Members pane. If you do not select a dimension member, the infotile displays the dimension starting at the top level selected in the Hierarchies tab.

7. On the Layout tab, do the following:
   - Select the graph type for the infotile.
   - Expand the **Content Area** panel, and then click the **Add Row** button. You can add up to four tables or graphs to display them in the content area for that infotile.

8. Click **Save and Close**.

### Setting Measure Targets for Use in Infotiles: Explained

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

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

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

1. Open the Manage Planning Measures page:
   - In the Navigator, click a Supply Chain Planning work area link.
   - On the Edit Plan page, click the Tasks panel tab.
   - In the Tasks panel drawer, click the Manage Planning Measures link.

2. On the Manage Planning Measures page, select the measure and click the Edit icon.

3. On the Edit Measure page, navigate to the Advanced tab, Goals subtab.

4. In the Goals subtab, select whether low values or high values are better.

   For example, high values are better for Gross Margin, but low values are better for Demand at Risk.

5. In the Global Goals section, provide a low range or a high range.

6. Click Save and Close.

### Graph Layout Options: Explained

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

The following types of graphs are available:

- **X and Y axes graphs**
  - Vertical bar
  - Horizontal bar
  - Line graph

- **X and Y axes graphs with additional parameters**
  - Area graph
  - Combination graph
  - Bubble graph

- **Pie graph**

- **Sunburst graph and Treemap graph**

- **Funnel graph and Radar graph**

- **Gauge graph**

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

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

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

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

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

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

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

**Why can't I edit graph layout options?**

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

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

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

Managing Measure Data in Tables

Editing Measure Data in a Table: Overview

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

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

Managing Data Calculation Options When Editing Measure Data in a Table: Explained

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

The Data Calculation Options choices are:

- Enable Automatic Calculations
- Calculate Now
Enable Automatic Calculations

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

Calculate Now

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

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

Locking Cells When Editing Measure Data or Allocating Values in a Table: Explained

When you are working in a Supply Chain Planning work area, you might be editing measure data in a table.

When you have locked cells, edits, including those that spread allocations to other cells, do not change locked cells.

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

Lock cells by performing one of the following:

- Click the Lock action in the Actions menu.
- Click the Lock icon on the table toolbar.
- Right-click in an editable cell.

How do I enable the Lock and Unlock actions for a table when editing measure data?

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

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

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

Exceptions and Exception Sets

Exceptions and Exception Sets in Supply Chain Planning: Explained

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

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

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

Editing Exceptions in Supply Chain Planning: Explained

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

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

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

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

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

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

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

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

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

Setting Filters on Planning Dimensions for Exception Reporting: Explained

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

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

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

Exceptions in Plans

Plan Exceptions in Supply Chain Planning: Explained

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

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

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

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

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

You can see the number of exceptions generated within parentheses after the exception name. Click the exception name to view a table with details of the exception. From the exception table, you can:

- Search for exceptions for a specific item and organization within a specified date range.
- Save the search criteria for future searches.
- Export the table to a spreadsheet, rearrange columns, and perform other standard table actions on the table.

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

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

### Configuring Exception Thresholds: Procedure

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

To configure exception thresholds, do the following:

1. From one of the Supply Chain Planning work areas, select the **Configure Exceptions** task.
2. On the Configure Exceptions page, select an exception.
3. Click **Actions** and select **Edit**.

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

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

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

### Creating Tables and Graphs for Exceptions: Procedures

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

#### Creating a Table for Exceptions

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

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

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

6. On the Hierarchies tab, include the Exception Type hierarchy.

7. On the Members tab, select the exception types to display in the table.

8. Click **Save and Close**.

Creating a Graph for Exceptions

1. In one of the Supply Chain Planning work areas, open a plan.

2. Click the **Actions** button and select **Manage Tables, Graphs, and Analysis Sets** from the drop-down list.

3. In the Manage Tables, Graphs, Analysis Sets dialog box, click **Actions**. Next, select **Create** and then select **Graph**.

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

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

6. On the Hierarchies tab, include the Exception Type hierarchy.

7. On the Members tab, select the exception types to display in the graph.

8. On the Layout tab, do the following:
   a. In the Graph Layout Options section, select a type of graph.
   b. Configure your graph in the horizontal panels below the Graph Layout Options.
      The horizontal panels below the Graph Layout Options section vary, depending on the type of graph that you select. For example, if you select Pie Graph for your graph type, the horizontal panels include General Options, Pie Slice, and Formatting.

9. Click **Save and Close**.

**Related Topics**

- Managing Tables, Graphs, Analysis Sets, Infotiles, and Tile Sets Using the Selector Tool: Explained
4 Using Planning Analytics

Setting Up Planning Analytics: Explained

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, Supply Chain Planning offering. On the Supply Chain Planning offering page, click Setup and then click the Supply Chain Planning Configuration functional area.

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 planning catalog named Default Catalog is not collected, then you must select at least one product hierarchy. If Default 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 select at least one product hierarchy.

Configuring Planning Analytics: Procedures

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.

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.
2. If you have clicked one of Supply Chain Planning work areas, then click the Tasks panel tab. In the Tasks panel drawer, click the Configure Planning Analytics link.
3. If you have clicked Setup and Maintenance, then in the Setup and Maintenance work area, select your offering. On the Setup: Supply Chain Planning page, click the Supply Chain Planning Configuration functional area, and then click the Configure Planning Analytics task.

Default Catalog is the name of the predefined dimension catalog. It contains predefined hierarchies. We recommend that you duplicate the Default Catalog if changes are required, instead of editing the default catalog.

4. 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.
5. Each 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.

6. Click the Levels and Attributes tab and select the desired dimension and hierarchy.
   
a. In the Dimension drop-down list, select a dimension.
   
b. Optionally, in the Hierarchy drop-down 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 Display Override field.

   ✷ Note: You cannot edit the Display Override field for the lowest level of the hierarchy.
   
e. 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 drop-down list, select an attribute.
      
      iii. In the Attribute Label text box, enter a label name and click OK.

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

Dimensions and Dimension Catalogs

Dimensions and Dimension Catalogs: Explained

Oracle Fusion Supply Chain Planning has hierarchy levels by which you can view, compare, and analyze demands and supplies of your products over various dimensions, such as geography and organizations. Supply Chain Planning uses a single set of dimensions and hierarchies to drive aggregation context for demand planning, supply planning, embedded analytics, and management analytics.

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

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

- If you are only using demand plans, then supplier, resource, and order type dimensions may not be relevant
- If you are using sales and operations plans, then the order type dimension is not relevant
The following hierarchies are predefined in Supply Chain Planning:

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

On the Configure Planning Analytics page, Dimension Catalogs tab in one of the Supply Chain Planning work areas, you can specify which hierarchy to use in a particular dimension catalog. Depending on your security privilege, you can also open the Configure Planning Analytics page from the Setup and Maintenance work area, Setup: Supply Chain Planning page, Supply Chain Planning Configuration functional area.

In the Dimension Catalog tab, several hierarchies are available in various dimensions. 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.

Setting Up Dimension Catalogs: Points to Consider

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

Hierarchy Selections for the Product Dimension

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

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

By default, Oracle Fusion Product Model’s planning functional area catalog is collected into the Product hierarchy. For the collection to run successfully, you must create the planning functional area catalog in Product Model with the following attributes:

- Controlled at = Master-Level (not Org-Level)
- Allow hierarchy of categories = No
- Default category must be selected
- Allow multiple item category assignments = Not selected
- Catalog Content = Items at Leaf Level
If this catalog is not set up with these attributes, the planning functional area catalog is not collected and the Product hierarchy will not be populated. This will result in the forecasting engine not being able to use the product aggregation and some of the predefined tables and graphs will not work correctly.

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

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

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

Hierarchy Selections for the Supplier dimension
The default Supplier hierarchy has two fixed levels: Supplier Site and Supplier.

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

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

What's a dimension in Supply Chain Planning?
A dimension is a structure that organizes data. It categorizes data to enable you to answer business questions. Commonly used dimensions are customers, products, and time.

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

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

Can I modify the default dimension catalog?

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

Measure Catalogs

Measure Catalogs: Explained

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

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

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

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

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

Can I modify the default measure catalog?

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

Levels and Attributes
Levels and Attributes: Explained

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

You can create a display name to use in the various pivot tables and graph configurations. For example, if the predefined level name is Product Category 2, you can enter a display name of Laptops.
5 Planning Measures

List of Predefined Measures for Supply Chain Planning: Explained

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

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

The Manage Planning Measures Task

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

A Spreadsheet Available at My Oracle Support

Use Doc ID 2374816.1, Oracle Supply Chain Planning Cloud: List of Predefined Measures. The List of Predefined Measures spreadsheet contains only the core measure attributes. You can use the Edit Measures page to view all the attributes associated with a particular measure.

Managing Planning Measures: Explained

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

Use this topic for the following purposes:

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

Updating the Definition of a Measure

To update the definition of a measure:

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

5. Click the measure you want to modify and click the **Edit** icon.

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

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

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

7. Click **Save and Close**.

**Updating Aggregation Parameters**

Aggregation parameters controls the way in which data of a measure is aggregated from the storage level to a table, graph, or infotile. Calculation Order allows you to choose between the following options: Calculate and aggregate or Aggregate then calculate. Calculate and Aggregate calculates the measure’s expression at the lowest data level and then aggregate up. Aggregate and Calculate aggregates all measures referenced in the measure’s expression and then calculate the expression.

**Updating Disaggregation Parameters**

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

The four different allocation methods are the following:

- **Same:** Indicates that all lower-level entries into which the data is being saved will receive the same value. Service level would be a good measure to use Same Value settings as the percentage being entered should not be allocated between different items and organizations.

- **Equal:** Spreads the edited value among the lower level entries into which data is being saved. Each entry receives an equal share of the update. This could commonly be seen on the time dimension, where data may be updated for a week or month, but there is no guidance on how it should be allocated to the common storage level of days. It is typically set to the time dimension to equal value to support equal allocation between the days.

- **Self:** Uses a measure’s own pre-calculated values to allocate the data to the dimension member combinations.

  For example, item-organization. The weights for each combination are calculated and stored for the measure during plan run. These weights are used to allocate the data. For example, the forecasts for P1-Org1 and P2-Org1 are 40 and 60 respectively. Therefore the weights used for allocation would be 40% for P1-Org1 and 60% for P2-Org1.

- **Measure:** Uses values of a different measure to allocate.

**Editing Data of a Measure**

To edit the data of a measure, open a pivot table containing the measure, double-click the cell where the data is to be entered, and enter the data. In a pivot table, editable and noneditable cells look similar. However, when you double-click a cell of an editable measure, the cell enables you to enter values.
Configuring Units for a Measure: Explained

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

In addition, sometimes different products and organizations have data that is loaded externally using different units of measure. For example, vitamins sold in Europe may be shipped in bottles, while in Asia the quantities are by pill count. By defining units, you enable these values to be converted into a cohesive value, which can be aggregated in a seamless manner.

To configure units for a measure:

1. In the **Navigator**, click a Supply Chain Planning work area.
2. Click the **Tasks** panel tab.
3. In the **Tasks** panel, click **Manage Planning Measures**.
4. Locate the measure for which you want to configure units and click **Edit**.
5. On the **Advanced** tab, select the **Properties** tab.
6. Select **UOM** from the drop-down list as the default value for the **Base Units of Measure**.
   - The base units of measure define the default unit of measure to which displayed data is converted. It is editable only for numeric measures, which do not have product and organization-based levels. For measures that have product and organization, the definition comes from the data source. When using the measure, you must attempt to select only the relevant UOM entries for the measure to streamline the user process.
7. Select the relevant units of measure from the **Display Unit of Measure**.
   - You completed defining the unit of measure. You can view the measure using a specific table or graph.

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

To override the default UOM:

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

Configuring Currencies for a Measure: Explained

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

To configure currencies for a measure:

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

6. Select Currency from the drop-down list as the default value for the Base Currency.

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

7. Select the relevant currencies from the Display Currency.

   You completed defining the currencies for a measure. You can view the measure using a specific table or graph.

The currency value is editable only if the measure type is Currency. For numeric measures, you can change the type from Number to Currency. Select the currency that you want to use in this instance of the measure.

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

To override the default currency:

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

Configuring Conditional Formatting for a Measure: Explained

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

To configure global conditions:

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measure</td>
<td>Locate the measure you want to use to evaluate. Conditional format for a measure can be based on another measure.</td>
</tr>
<tr>
<td>Condition</td>
<td>Compares the selected measure to a value or another measure</td>
</tr>
<tr>
<td>Compare to Measure</td>
<td>Measure to which the selected measure is compared</td>
</tr>
<tr>
<td>Value</td>
<td>When the Compare to Measure is empty, this value is used to compare the selected measure</td>
</tr>
</tbody>
</table>
To configure local overrides to conditions:

1. Open a table and select View, Format Measures to find the measure you want to modify.
2. Select the Override Conditional Formatting check box.
3. Select a new conditional format that you want to use in the table. The conditional formatting section appears.
   - The definition is the same as the global settings that include measure, condition, second measure, and value.
4. Click Save and Close.

**Viewing the Audit Trail for a Measure: Explained**

Use the Audit Trail of Measure Updates table to view the audit trail for a measure. The table displays details of changes made to measure values for auditing purposes. You can view the audit trail for all measure types, such as numeric, date, and string.

The Audit Trail of Measure Updates table is available for Demand Plan, Supply Plan, Demand and Supply Plan, and Sales and Operations Plan types. You can access the audit trail from your respective Supply Chain Planning work area.

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

> **Note:** Only the user who updated the measure can view the previous value and new value in the audit row.

Other users, who have permissions to view the audit trail, must open the Audit Trail Details page to view the details.

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

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

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

## Importing Measure Data at Aggregate Levels: Explained

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

You can import measure data at the following aggregate levels:

- Category level in Product dimension
- Weekly for a Manufacturing Calendar in Time dimension. Monthly and Quarterly for a Gregorian or Fiscal calendar in Time dimension.
- Customer level in Customer dimension
- Business Unit or Legal Entity level in Organization dimension
- Division, Region, or Territory level in Sales Organization dimension

You cannot import data at aggregate levels for shared measures, such as Shipments History, Adjusted Shipments History, Bookings History, and Adjusted Bookings History.

### Related Topics

- Using the Import Templates to Create the CSV Files for Supply Chain Planning: Explained
6 Run Collections

Collecting Planning Data: Explained

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

To collect data into the planning data repository, you can perform these tasks:

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

Depending on your security privileges, you can perform these tasks from one of the Supply Chain Planning work areas or you can navigate to the Setup and Maintenance work area, Supply Chain Planning offering, Supply Chain Planning Configuration functional area.

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

![Data Collection Diagram]

There are two steps involved in the data collection process. The Collect Planning Data process first pulls data from the Oracle Fusion source system into staging tables. The process then loads data from the staging tables into the planning data repository.
On the Collect Planning Data page, use the following tabs to select what data you want to collect:

- Reference Data
- Demand Planning Data
- Supply Planning Data

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

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

Load Planning Data from Files

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

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

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

Collecting Global Entities: Explained

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

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

For example, the following scenario describes the collection method of the global entity called units of measure (UOM) from three source systems, namely source system A, B, and C respectively.

- Source system A has an instance of UOM. During the collection of UOMs from source system A, the kilogram UOM is collected. This is the first time the kilogram UOM is collected. The data collections process creates a kilogram record in the data repository.
- Source system B does not have any instance of UOM. During the collection of UOMs from source system B, the data collections process does not collect the kilogram value. Since there was no record for the kilogram UOM in source system B, the data collections process does not change the kilogram record in the data repository. The record of the kilogram value from source system A is still valid.
• Source system C has an instance of UOM. During the collection of UOMs from source system C, the kilogram UOM is again collected. The data collections process registers the kilogram record in the data repository to match the values from source system C.

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

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

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

### Targeted, Net Change, and Automatic Selection Collection Types: Explained

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 cannot make any changes in the Reference Data, Demand Planning Data, and Supply Planning Data tabs.

Data Collections, Order Orchestration, and Order Promising: How They Fit Together

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

Data Collections

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

Order Orchestration

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

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

Order Promising

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

**Related Topics**
- Refreshing the Global Order Promising Engine: Explained

**Enable Cross-References of Entities by Data Collections: Explained**

Cross-references allows 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.

**Collecting Data from the Oracle Fusion Source System**

**Collecting Reference, Supply, and Demand Data from Oracle Fusion Source System: Explained**

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.

![Diagram of data categories](image)

Explanation of Callouts

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

Reference Data

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

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

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

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

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

Supply Data
You collect supply data from three sources:

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

Using Collection Filters and Collection Templates: Explained
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 privilege, you can also open the Collect Planning Data page from the Setup and Maintenance work area.

1. On the Setup and Maintenance work area, click the Supply Chain Planning offering, and then click the Supply Chain Planning Configuration functional area.
2. From the Supply Chain Planning Configuration functional area, click the Collect Planning Data task.

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.

Collecting from the Oracle Fusion Source Using the Targeted Collection Type: Procedure

Run the targeted collection to perform a complete refresh of the data repository. You can either run the targeted collection immediately or schedule the process to run later. The demand planning data can only be collected using the Targeted collection type.

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

1. Click one of the Supply Chain Planning work areas or the Setup and Maintenance work area.
2. If you have clicked **Setup and Maintenance**, then in the Setup and Maintenance work area, select your offering. On the Setup: Supply Chain Planning page, click the Supply Chain Planning Configuration functional area, and then click the **Collect Planning Data** task.
3. If you have clicked one of Supply Chain Planning work areas, then click the Tasks panel tab. In the Tasks panel drawer, click the **Collect Planning Data** task.
4. Complete the following parameters for the Collect Planning Data process:
   
   a. Select your source system.
   b. For the collection type, select **Targeted**.
   c. Select the collection filters.
   d. In the Reference Data tab, move the required reference entities to the Selected Entities area.
   e. In the Demand Planning Data tab, perform the following steps:

   - Select **Collection Time Frame Options**.

   The planning process uses the historical demand data for statistical forecasting. You can collect the historical demand data in the planning data repository using the options provided in the Demand Planning Data tab. In the Collection Time Frame Options section, you can specify the date range for which you want to collect data. The Fixed Date Range option allows you to collect history data within a date range that you specify.

   The Rolling Date Range option allows you to collect the history data for the number of days that you specify. For example, if you forecast weekly, collect the demand history data once per week and select a Rolling Date Range of seven (7) days. The data collections collect the demand history data for the latest week.

   The Roll off time periods automatically option truncates the history data by the number of days that you specify in the Number of days to keep field each time you run collections for the demand history data. For example, if you prefer to forecast each week based on the history data of 52 weeks, select the Roll off time periods automatically check box and specify Number of days to keep as 364 days (52 times 7). This setting ensures that as you collect data every week, you keep the most recent history of 52 weeks and automatically purge history data older than 52 weeks.

   - Select your shipments history and bookings history measures. Select the relevant check boxes to collect amount data, historical transfer orders, and price lists, in addition to the selected measures. To
collect only specific order types, select from the **Order Types to Include** list of values. By default, all order types are included. If you have selected history measures and attributes, select the relevant check boxes to collect shipment history options and booking history options.

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

1. In the Supply Planning Data tab, move the required supply entities to the Selected Entities area. If you collect Resource Availability, provide the Resource Availability start date and end date. You can collect the existing data for the resource availability. You can also regenerate the resource availability data and then collect the data. If you select the **Regenerate data, and then collect** option, the collections process runs the Update Resource Availability Job scheduled process first, and then collects the resource availability data.

5. (Optional) Click the **Schedule** tab and set collections to run as soon as possible or schedule to run at a different time.

6. Click **Submit** to start the collections process.

7. Monitor the collection status using the Scheduled Processes page.

8. Review the collected data in the Plan Inputs work area.

### Collecting from the Oracle Fusion Source Using the Net Change Type: Procedure

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. In the Navigator, click one of the Supply Chain Planning work areas or Setup and Maintenance work area.

2. If you have clicked **Setup and Maintenance**, then in the Setup and Maintenance work area, select your offering. On the Setup: Supply Chain Planning page, click the Supply Chain Planning Configuration functional area, and then click the **Collect Planning Data** task.

3. If you have clicked one of Supply Chain Planning work areas, then click the Tasks panel tab. In the Tasks panel drawer, click the **Collect Planning Data** task.

4. 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.

5. (Optional) Click the **Schedule** tab and set collections to run as soon as possible or schedule to run at a different time.

6. Click **Submit** to initiate the collections process.

7. Monitor the collection status using the Scheduled Processes page.

8. Review the collected data in the Plan Inputs work area.
Loading Planning Data from Files

Loading Planning Data from Files: Overview

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

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

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

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

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

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

Creating CSV Files Used to Load Planning Data: Procedure

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

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

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

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

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

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

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

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

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

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

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

Data Collection Sequence: How Collection Entities are Related

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

1. Define Source System
2. Currency
   - Currency Conversion Type
     - Currency Conversion Rate
3. Calendar*
4. Demand Class
5. UOM
   - Location
     - UOM Conversions
6. Organization*
   - UOM Class Conversions

Continue to the next diagram
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.
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.

Using the Import Templates to Create the CSV Files: Explained

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

**Collect Data for the Oracle Fusion Source**

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

<table>
<thead>
<tr>
<th>Collections Entity</th>
<th>Link in Data Import Guide</th>
<th>XLSM File Name</th>
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<tr>
<td>Item Costs</td>
<td>Supply Chain Planning Item Cost</td>
<td>ScpItemCostImportTemplate. xlsm</td>
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<td>Customer Specific Item Relationships</td>
<td>Supply Chain Planning Item Substitute</td>
<td>ScpItemSubstituteImportTemplate. xlsm</td>
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<td>Planners</td>
<td>Supply Chain Planning Planners</td>
<td>ScpPlannersImportTemplate. xlsm</td>
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<tr>
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<td>ScpPlanningAllocationRulesImportTemplate. xlsm</td>
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<tr>
<td>ATP Assignments and ATP Rules</td>
<td>Supply Chain Planning Available-to-Promise Rules</td>
<td>ScpATPRulesImportTemplate. xlsm</td>
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<td>Supply Update Rules</td>
<td>Supply Chain Planning Real Time Supply Updates</td>
<td>ScpRealTimeSupplyUpdatesImportTemplate. xlsm</td>
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<td>Booking History</td>
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### Collections Entity | Link in Data Import Guide | XLSM File Name
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Forecasts | Supply Chain Planning External Forecasts | ScpExternalForecastImportTemplate.xlsm
Safety Stock Levels | Supply Chain Planning Safety Stock Levels | ScpSafetyStockLevelImportTemplate.xlsm
Supplier Capacity | Supply Chain Planning Approved Supplier Capacity | ScpApprovedSupplierCapacityImportTemplate.xlsm
Planned Order Supplies | Supply Chain Planning Planned Order Supply | ScpPlannedOrderSupplyImportTemplate.xlsm
Sourcing Rule and Assignments | Supply Chain Planning Sourcing Rules | ScpSourcingImportTemplate.xlsm
Cross-Reference Mapping Information | Supply Chain Planning Cross-Reference Data | ScpCrossReferenceDataImportTemplate.xlsm

### Collect Data from External Source - Version Others

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

<table>
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<tr>
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<tbody>
<tr>
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<tr>
<td>Organizations (Warehouses) and Organization Site (Including Organization Site - Internal Location Mapping)</td>
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<tr>
<td>Subinventories</td>
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<td>Suppliers and Supplier Sites</td>
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<td>Interlocation Shipping Networks</td>
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<td>Customer Specific Item Relationships</td>
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<td>Supply Chain Planning Planners</td>
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<td>ScpPlanningSupplierImportTemplate.xlsm</td>
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<td>Item Suppliers</td>
<td>Supply Chain Planning Approved Supplier List</td>
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<td>Allocation Assignments and Allocation Rules</td>
<td>Supply Chain Planning Allocation Rules</td>
<td>ScpPlanningAllocationRulesImportTemplate. xlam</td>
</tr>
<tr>
<td>ATP Assignments and ATP Rules</td>
<td>Supply Chain Planning Available-to-Promise Rules</td>
<td>ScpATPRulesImportTemplate. xlam</td>
</tr>
<tr>
<td>Supply Update Rule</td>
<td>Supply Chain Planning Real Time Supply Updates</td>
<td>ScpRealTimeSupplyUpdatesImportTemplate. xlam</td>
</tr>
<tr>
<td>Freight Terms, FOB Points, Invoicing and Accounting Rules, Shipment Priorities, Payment Terms, Return Reason, Tax Classification Code, Tax Exemption Reason, Sales Credit Type, Activity Type, Document Categories, Payment Methods, and Receipt Methods</td>
<td>Supply Chain Planning Order Orchestration</td>
<td>ScpOrderOrchestrationImportTemplate. xlam</td>
</tr>
<tr>
<td>Booking History</td>
<td>Supply Chain Planning Bookings History</td>
<td>ScpBookingHistoryImportTemplate. xlam</td>
</tr>
<tr>
<td>Option Booking History</td>
<td>Supply Chain Planning Option Bookings History</td>
<td>ScpOptionBookingHistoryImportTemplate. xlam</td>
</tr>
<tr>
<td>Shipment History</td>
<td>Supply Chain Planning Shipments History</td>
<td>ScpShipmentHistoryImportTemplate. xlam</td>
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<tr>
<td>Option Shipment History</td>
<td>Supply Chain Planning Option Shipments History</td>
<td>ScpOptionShipmentHistoryImportTemplate. xlam</td>
</tr>
<tr>
<td>Price Lists</td>
<td>Supply Chain Planning Price Lists</td>
<td>ScpPriceListImportTemplate. xlam</td>
</tr>
<tr>
<td>Causal Factors</td>
<td>Supply Chain Planning Causal Factors</td>
<td>ScpCausalFactorsImportTemplate. xlam</td>
</tr>
<tr>
<td>Collections Entity</td>
<td>Link in Data Import Guide</td>
<td>XLSM File Name</td>
</tr>
<tr>
<td>--------------------------------------------------------</td>
<td>-------------------------------------------------------</td>
<td>----------------------------------------------------------</td>
</tr>
<tr>
<td>Forecasts Measures</td>
<td>Supply Chain Planning Forecast Measures</td>
<td>ScpForecastMeasureImportTemplate. xlsm</td>
</tr>
<tr>
<td>Fiscal Calendars</td>
<td>Supply Chain Planning Fiscal Calendars</td>
<td>ScpFiscalCalendarImportTemplate. xlsm</td>
</tr>
<tr>
<td>Forecasts</td>
<td>Supply Chain Planning External Forecast</td>
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</tr>
<tr>
<td>User-Defined Hierarchies</td>
<td>Supply Chain Planning User-Defined Hierarchies</td>
<td>ScpCustomHierarchyImportTemplate. xlsm</td>
</tr>
<tr>
<td>Safety Stock Levels</td>
<td>Supply Chain Planning Safety Stock Levels</td>
<td>ScpSafetyStockLevelImportTemplate. xlsm</td>
</tr>
<tr>
<td>Supply Reservations to Sales Orders</td>
<td>Supply Chain Planning Reservations</td>
<td>ScpReservationImportTemplate. xlsm</td>
</tr>
<tr>
<td>On Hand</td>
<td>Supply Chain Planning Supply On Hand</td>
<td>ScpOnhandImportTemplate. xlsm</td>
</tr>
<tr>
<td>Purchase Orders, Purchase Requisitions, PO in Receiving, and In Transits</td>
<td>Supply Chain Planning Purchase Order Requisitions</td>
<td>ScpPurchaseOrderRequisitionImportTemplate. xlsm</td>
</tr>
<tr>
<td>Transfer Orders</td>
<td>Supply Chain Planning Transfer Orders</td>
<td>ScpTransferOrderImportTemplate. xlsm</td>
</tr>
<tr>
<td>Supplier Capacity</td>
<td>Supply Chain Planning Approved Supplier Capacity</td>
<td>ScpApprovedSupplierCapacityImportTemplate. xlsm</td>
</tr>
<tr>
<td>Resources and Resource Shifts</td>
<td>Supply Chain Planning Resources</td>
<td>ScpResourcesImportTemplate. xlsm</td>
</tr>
<tr>
<td>Resource Availability</td>
<td>Supply Chain Planning Resource Availability</td>
<td>ScpResourceAvailabilityImportTemplate. xlsm</td>
</tr>
<tr>
<td>Work Definition (Including mapping between Item Structures and Work Definitions, Work Definition Operations, and Work Definition Operation Resources)</td>
<td>Supply Chain Planning Routings</td>
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<tr>
<td>Work Order Supply</td>
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<td>ScpWorkOrderSuppliesImportTemplate. xlsm</td>
</tr>
<tr>
<td>Work Order Material Requirements</td>
<td>Supply Chain Planning Work Order Component Demands</td>
<td>ScpWIPComponentDemandsImportTemplate. xlsm</td>
</tr>
<tr>
<td>Work Order Resource Requirements</td>
<td>Supply Chain Planning Work Order Operation Resources</td>
<td>ScpWIPOperationResourceImportTemplate. xlsm</td>
</tr>
<tr>
<td>Planned Order Supplies</td>
<td>Supply Chain Planning Planned Order Supply</td>
<td>ScpPlannedOrderSupplyImportTemplate. xlsm</td>
</tr>
<tr>
<td>Sourcing Rule and Assignments</td>
<td>Supply Chain Planning Sourcing Rules</td>
<td>ScpSourcingImportTemplate. xlsm</td>
</tr>
</tbody>
</table>
Collect Data from External Source - Version External

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

<table>
<thead>
<tr>
<th>Collection Entities</th>
<th>Link in FBDI Guide</th>
<th>XLSM File Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Items</td>
<td>Supply Chain Planning Items</td>
<td>ScpItemImportTemplate. xlsm</td>
</tr>
<tr>
<td>Item Costs</td>
<td>Supply Chain Planning Item Cost</td>
<td>ScpItemCostImportTemplate. xlsm</td>
</tr>
<tr>
<td>Item Relationships</td>
<td>Supply Chain Planning Item Substitute</td>
<td>ScpItemSubstituteImportTemplate. xlsm</td>
</tr>
<tr>
<td>Catalogs, Categories, and Item Categories</td>
<td>Supply Chain Planning Catalogs</td>
<td>ScpCatalogImportTemplate. xlsm.xlsm</td>
</tr>
<tr>
<td>Item Structures</td>
<td>Supply Chain Planning Item Structures</td>
<td>ScpBillOfMaterialImportTemplate. xlsm</td>
</tr>
<tr>
<td>Bill of Resources</td>
<td>Supply Chain Planning Bill of Resources</td>
<td>ScpBillOfResourcesImportTemplate. xlsm</td>
</tr>
<tr>
<td>Planners</td>
<td>Supply Chain Planning Planners</td>
<td>ScpPlannersImportTemplate. xlsm</td>
</tr>
<tr>
<td>Customers and Customer Sites</td>
<td>Supply Chain Planning Customers</td>
<td>ScpCustomerImportTemplate. xlsm</td>
</tr>
<tr>
<td>Regions</td>
<td>Supply Chain Planning Regions</td>
<td>ScpRegionsImportTemplate. xlsm</td>
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<td>Zones</td>
<td>Supply Chain Planning Zones</td>
<td>ScpZonesImportTemplate. xlsm</td>
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<tr>
<td>Region-Zone Mapping</td>
<td>Supply Chain Planning Region Zone Mappings</td>
<td>ScpRegionZoneMappingImportTemplate. xlsm</td>
</tr>
<tr>
<td>Locations and Region-Location Mapping</td>
<td>Supply Chain Planning Locations</td>
<td>ScpLocationsImportTemplate. xlsm</td>
</tr>
<tr>
<td>Organizations and Organization Sites</td>
<td>Supply Chain Planning Organizations</td>
<td>ScpOrganizationImportTemplate. xlsm</td>
</tr>
<tr>
<td>Collection Entities</td>
<td>Link in FBDI Guide</td>
<td>XLSM File Name</td>
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<tr>
<td>Subinventories</td>
<td>Supply Chain Planning Subinventories</td>
<td>ScpSubInventoryImportTemplate. xlsx</td>
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<tr>
<td>Supplier Sites</td>
<td>Supply Chain Planning Suppliers</td>
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</tr>
<tr>
<td>Item Suppliers (Approved Supplier List)</td>
<td>Supply Chain Planning Approved Supplier List</td>
<td>ScpApprovedSupplierListImportTemplate. xlsx</td>
</tr>
<tr>
<td>Interlocation Shipping Networks and Transit Times</td>
<td>Supply Chain Planning Interlocation Shipping Methods</td>
<td>ScpInterLocationShipMethodsImportTemplate. xlsx</td>
</tr>
<tr>
<td>Currencies and Currency Conversions</td>
<td>Supply Chain Planning Currencies</td>
<td>ScpCurrencyImportTemplate. xlsx</td>
</tr>
<tr>
<td>Units of Measure, Units of Measure Conversions, and Units of Measure Class Conversions</td>
<td>Supply Chain Planning Units of Measure</td>
<td>ScpUOMImportTemplate. xlsx</td>
</tr>
<tr>
<td>Calendars, Calendar Exceptions, Shift Workday Pattern, Week Start Dates, and Period Start Dates</td>
<td>Supply Chain Planning Calendars</td>
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<tr>
<td>Calendar Associations</td>
<td>Supply Chain Planning Calendar Assignments</td>
<td>ScpCalendarAssignmentsImportTemplate. xlsx</td>
</tr>
<tr>
<td>Demand Classes</td>
<td>Supply Chain Planning Demand Classes</td>
<td>ScpDemandClassImportTemplate. xlsx</td>
</tr>
<tr>
<td>Carrier, Ship Mode of Transport, and Ship Class of Service</td>
<td>Supply Chain Planning Carriers</td>
<td>ScpCarrierImportTemplate. xlsx</td>
</tr>
<tr>
<td>GOP Allocation Rules and Rule Assignments</td>
<td>Supply Chain Planning Planning Allocation Rules</td>
<td>ScpPlanningAllocationRulesImportTemplate. xlsx</td>
</tr>
<tr>
<td>GOP ATP Rules and Rule Assignments</td>
<td>Supply Chain Planning Available-to-Promise Rules</td>
<td>ScpATPRulesImportTemplate. xlsx</td>
</tr>
<tr>
<td>GOP Supply Update Rules</td>
<td>Supply Chain Planning Real Time Supply Updates</td>
<td>ScpRealTimeSupplyUpdatesImportTemplate. xlsx</td>
</tr>
<tr>
<td>Order Orchestration Reference Objects: Freight Terms, FOB Points, Invoicing and Accounting Rules, Shipment Priorities, Payment Terms, Return Reason, Tax Classification Code, Tax Exemption Reason, Sales Credit Type, Activity Type, Document Categories, Payment Methods, and Receipt Methods</td>
<td>Supply Chain Planning Order Orchestration</td>
<td>ScpOrderOrchestrationImportTemplate. xlsx</td>
</tr>
<tr>
<td>Cross Reference Mapping Information</td>
<td>Supply Chain Planning Cross-Reference Data</td>
<td>ScpCrossReferenceDataImportTemplate. xlsx</td>
</tr>
<tr>
<td>Booking History</td>
<td>Supply Chain Planning Bookings History</td>
<td>ScpBookingHistoryImportTemplate. xlsx</td>
</tr>
<tr>
<td>Collection Entities</td>
<td>Link in FBDI Guide</td>
<td>XLSM File Name</td>
</tr>
<tr>
<td>---------------------</td>
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<td>----------------</td>
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<tr>
<td>Option Booking History</td>
<td>Supply Chain Planning Option Bookings History</td>
<td>ScpOptionBookingHistoryImportTemplate.xlsm</td>
</tr>
<tr>
<td>Shipment History</td>
<td>Supply Chain Planning Shipments History</td>
<td>ScpShipmentHistoryImportTemplate.xlsm</td>
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<td>Supply Chain Planning Option Shipments History</td>
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<tr>
<td>Causal Factors</td>
<td>Supply Chain Planning Causal Factors</td>
<td>ScpCausalFactorsImportTemplate.xlsm</td>
</tr>
<tr>
<td>Forecast Measures</td>
<td>Supply Chain Planning Forecast Measures</td>
<td>ScpForecastMeasureImportTemplate.xlsm</td>
</tr>
<tr>
<td>Fiscal Calendars</td>
<td>Supply Chain Planning Fiscal Calendars</td>
<td>ScpFiscalCalendarImportTemplate.xlsm</td>
</tr>
<tr>
<td>Measures, Sales and Operations Planning Backlog, Inventory, and Production History</td>
<td>Supply Chain Planning Measures</td>
<td>ScpMeasuresImportTemplate.xlsm</td>
</tr>
<tr>
<td>User-Defined Hierarchies</td>
<td>Supply Chain Planning User-Defined Hierarchies</td>
<td>ScpCustomHierarchyImportTemplate.xlsm</td>
</tr>
<tr>
<td>Forecasts</td>
<td>Supply Chain Planning External Forecasts</td>
<td>ScpExternalForecastImportTemplate.xlsm</td>
</tr>
<tr>
<td>Sales Orders</td>
<td>Supply Chain Planning Sales Orders</td>
<td>ScpSalesOrderImportTemplate.xlsm</td>
</tr>
<tr>
<td>Safety Stock Levels</td>
<td>Supply Chain Planning Safety Stock Levels</td>
<td>ScpSafetyStockLevelImportTemplate.xlsm</td>
</tr>
<tr>
<td>Supply Reservations to Sales Orders</td>
<td>Supply Chain Planning Reservations</td>
<td>ScpReservationImportTemplate.xlsm</td>
</tr>
<tr>
<td>On Hand</td>
<td>Supply Chain Planning Supply On Hand</td>
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</tr>
<tr>
<td>Purchase Orders, Purchase Requisitions, PO in Receiving, In Transits</td>
<td>Supply Chain Planning Purchase Order Requisitions</td>
<td>ScpPurchaseOrderRequisitionImportTemplate.xlsm</td>
</tr>
<tr>
<td>Transfer Orders (including expense type transfers)</td>
<td>Supply Chain Planning Transfer Orders</td>
<td>ScpTransferOrderImportTemplate.xlsm</td>
</tr>
<tr>
<td>Supplier Capacity</td>
<td>Supply Chain Planning Approved Supplier Capacity</td>
<td>ScpApprovedSupplierCapacityImportTemplate.xlsm</td>
</tr>
<tr>
<td>Resources, Resource Shifts</td>
<td>Supply Chain Planning Resources</td>
<td>ScpResourceImportTemplate.xlsm</td>
</tr>
<tr>
<td>Resource Availability</td>
<td>Supply Chain Planning Resource Availability</td>
<td>ScpResourceAvailabilityImportTemplate.xlsm</td>
</tr>
</tbody>
</table>
Loading Planning Data from Files: Procedure

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

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

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

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

Verifying the Load Planning Data Process: Procedure

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 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.

Reviewing Data in the Planning Data Repository: Explained

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

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

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

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

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

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

- Supply data
- Demand data

You can view Carriers and Suppliers using either option.

Review Data Using the Plan Inputs Page Layout

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

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

![Plan Inputs and Plan Inputs page](image)

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

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

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

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

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

### Aggregating Customer Data

#### Aggregate Customer Data: Overview

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

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

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

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

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

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

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

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

Using the Key Customer Options Template: Points to Consider

Use the ScpKeyCustomerOptionsImportTemplate.xlsm file to identify the key customers for which nonaggregated data must be made available. For non-key customers, the aggregation level that you define in the import template determines whether the data must be retained or aggregated.

The key customers are identified in the KeyCusOptnHeader tab by entering the name of a valid customer hierarchy in the Hierarchy Name column and entering a valid level of that hierarchy in the Level Name column. All customers in this level are identified as key customers. To have only certain customers identified as key customers, enter the specific customer names in the KeyCusOptnMembers detail tab.

You can use the aggregated key customer data to build a plan specifically for your key customers.

Define the key customers in the template and set the aggregation level values for both key and non-key customers, and upload the template. Use the settings in the template to set the data to different aggregation levels, such as 1, 2, or 3.

Aggregation Levels

The aggregation levels are listed in the following table.

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

When you create a plan with key customers, data is available at the lowest level for key customers, and data for non-key customers is aggregated to an All Other member.
To remove the key customer designation for previously-loaded customers, use Aggregation Level 3. This enables data for all customers to be made available at the lowest level. No customers are marked as key customers.

Selecting Aggregation Level 3 results in the following:

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

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

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

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

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

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

Loading Aggregated Customer Data from Oracle E-Business Suite: Procedure

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

The procedure is comprised of the following steps:

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

Additional details for each step are provided in this topic.

Prerequisites

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

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

You can perform the steps to import data into your Oracle Supply Chain Planning Cloud destination system from one of the Supply Chain Planning work areas. You do not need an administrator role to perform these steps.
Extract Data
To extract the data from your Oracle E-Business Suite source system, run the Extract Data for Oracle Supply Chain Planning Cloud process.

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

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

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

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

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

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

Add the Files to Your Desktop or Local Hard Drive
Locate the extracted Zip file on your Oracle E-Business Suite middle tier, and download or transfer the file to your desktop or local hard drive.

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

Import Data into Your Oracle Supply Chain Planning Cloud Destination System
To import the data into your Oracle Supply Chain Planning Cloud destination system, perform these steps:

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

Managing Demand Plans

Creating a Plan: Procedure

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

Use this generic procedure to create and run a plan:

1. In the Navigator, click a Supply Chain Planning work area link.
2. Click the Tasks panel tab.
3. In the Tasks panel drawer, click the Manage Plans link.
4. In the Search Results region, from the Actions menu, select Create.
5. Complete the following information for the plan:
   a. Enter a name.
   b. (Optional) Provide a description for the plan.
   c. Select the plan type.
   d. (Optional) Select the Enable for OTBI reporting check box to make measures from a plan available in Oracle Transactional Business Intelligence (OTBI) for reporting.
   e. Select the owner.
   f. Define the access level:
      i. Select Public to make the plan accessible for all users.
      ii. Select Private to restrict the plan accessible to you and to a list of users that you want to provide access.
6. Based on the type of plan that you selected, complete the required information in one or more tabs (Scope, Demand, Safety Stock, and Supply).
7. Click Save and Close.
8. Click Actions menu and select Run.

Copying a Plan: Procedure

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

Use the Duplicate procedure to:

- Create a copy of an existing plan that includes the plan data.
- Create only a copy of plan options.
To copy a plan:

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

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

3. Click Save and Close

Viewing a Plan: Procedure

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

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

1. In the Navigator, click a Supply Chain Planning work area link.
2. Click the Plans drawer.
3. Expand Plans, and select the plan of your choice.
4. Click the Actions button and select Open.
Tip: If you have many plans, you have an option to search a plan by using the Manage Plans task. In this case, provide appropriate search criteria and click Search. In the search results area, select your plan and click the Action button and select Open. Oracle recommends this method to view sales and operations plans.

Enabling Plans for OTBI Reporting: Explained

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

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

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

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

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

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

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

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

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

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

To access the OTBI reports:

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

The OTBI report opens in the context of the current, open plan.

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

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

Available Measures

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

- Configure to Order Forecast Metrics: The following configure to order forecast metrics are available for demand plans, and demand and supply plans:
  - Final Option Demand Forecast
  - Final Planning Percent
  - Option Demand Forecast

  Configure to order forecast metrics support dimensions, such as Plan, Time, Product, Organization, Customer, Top Model, and Demand Class.

- Demand Management Metrics: The following demand management metrics are available for demand plans, and demand and supply plans:
  - Bookings Forecast
  - Bookings History
  - Bookings History Value
  - Final Bookings Forecast
  - Final Shipments Forecast
  - Shipments Forecast
  - Shipments Forecast Value
  - Shipments History
• Shipments History Value

Demand management metrics support dimensions, such as Time, Product, Organization, Customer, and Demand Class.

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

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

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

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

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

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

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

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

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Defining Scope Plan Options: Explained

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

- Plan Organizations
- Forecasting Items (available only for demand plans or demand and supply plans)
- Supply Planned Items (available only for supply plans or demand and supply plans)
- Plan Parameters

Plan Organizations

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

Forecasting Items

Specify a hierarchy, level, and level members by which to filter specific items for demand planning. Your selections are used in conjunction with your selections in the Plan Organizations section. Items that belong to a parent level will be included. Fields in this section are not required. However, if you do not specify a hierarchy, level, and level members, then you cannot filter supply planned items. In this situation, your plan will include all planned items in the selected organizations, which can have performance implications.

Note: The Forecasting Items section is not available for supply-only plans.

Supply Planned Items

For Supply Planned Item Type, select Manufacturing Plan (MRP) or Production Plan (MPS).

For Supply Planned Items, select the option to control the items to include in the supply plan. Options are:

- All planned items: This option can have performance implications.
- Demand plan items and all sales orders
- Demand plan and WIP components
- Demand plan items only
- Demand plan items, WIP components, and all sales orders

Note: The Supply Planned Items section is not available for demand-only plans.

Plan Parameters

The Plan Parameters section is available for demand, supply, and demand and supply plans. The following table describes the plan parameters.

The following table describes the plan parameters.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan Horizon Days</td>
<td>Number of days in the plan. Set horizon days to forecast and plan for future needs. Minimize horizon days to avoid long-running plans. Default is 180 days.</td>
</tr>
</tbody>
</table>
### Related Topics

- Managing Plans: Explained
- Dimensions and Dimension Catalogs: Explained
- Why can't I select Supply Planned Items?

## Adding Forecasting Profiles to Demand Plans: Explained

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

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

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

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

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

The following table lists the predefined forecasting profiles.

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

Analysis Set

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

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

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

Historical Buckets

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

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

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

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

History Start and End Dates

The plan definitions drive the history start date. History end date is calculated based on the end date and historical buckets.
Forecast Buckets
Indicates how far into the future a demand forecast will be generated and is driven by the planning horizon set for the plan.

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

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

Running a Demand Plan: Procedure
Run a demand plan to generate forecasts. When you run a demand plan, you can specify the scope of the plan that you want to run. You can decide whether to refresh the plans input data before running it. Also, you can run the plan immediately or you can run the plan in the background at a set time or on a repetitive schedule, such as daily or weekly.

After you create a plan, you must run the plan to generate the data. In the Run Plan dialog box, Parameters tab, run plan options are sequenced in the order of operations: data refresh, scope, and demand. The forecasting process runs first, and then the output is used for planning calculations. You can configure the following options for a demand plan:

- Data Refresh Options
- Scope Options
- Demand Plan Run Options

Data Refresh Options
The following data refresh options are available:

- **Do not refresh with current data**: Select this option to run your plan with no changes to demand, including no advancement of the plan start date. You also use this option for simulation planning.

- **Refresh with selected current data**: Select this option to partially refresh your data. You can refresh transaction data and some reference data without performing a full refresh.

- **Refresh with current data**: Select this option to refresh the complete plan with the latest collected data and advance the plan start date. If you are running the plan for the first time, this is the only data refresh option available and it is selected by default.
Scope Options
Select Archive plan to archive data from the plan.

Demand Plan Run Options
Use Demand Plan Run Options to generate a demand forecast. Select the forecasting profiles that you want to include as part of the plan. If you do not select a forecasting profile, then the demand forecasting process does not run.

Forecast Profiles: Select the forecasting profiles that you want to include as part of the plan. If you do not select a forecasting profile, then the forecasting process does not run.

Include details of forecast methods: Select to specify whether to provide details of the forecast methods that make up the forecast. You must select this option to view the resulting forecast decomposed by the forecasting method. Selecting this option increases the time required to run the plan.

Include details of causal factors: Select to specify whether to provide details of the causal factors that make up the forecast. You must select this option to view the resulting forecast decomposed by the causal factor group. Selecting this option increases the time required to run the plan.

Running a Demand Plan
To run a supply plan or an integrated plan, do the following:

1. Open the Run Plan dialog box:
   a. In the Navigator, click the Demand Management work area.
   b. Click the Plans panel tab and expand the Plans list.
   c. Select the plan that you want to run, click Actions, and then select Run.

2. In the Run Plan dialog box, Parameters, tab, expand Details to review the plan options:
   a. In the Data Refresh Options section, review the options and make appropriate selections.

   Note: If you are running the plan for the first time, you must select Refresh with Current Data. This option refreshes historical data, imports sales orders, and advances the plan start date to align with the current date.

   b. In the Scope Options section, select Archive plan to archive the plan during the plan run.
   c. In the Demand Plan Options section, select the appropriate options, including the forecasting profiles that you want to include as part of the plan run.

3. To schedule running the plan, click the Schedule tab to set up the frequency parameters:
   a. To run the plan immediately, select As soon as possible.
   b. To run the plan in the background at a set time, select Using a schedule and then select a Frequency, such as Daily or Weekly

4. Click OK to run the plan.

Related Topics
- Reviewing Plan Messages: Explained
Forecasting Methods and Forecasting Using Demand Planning: Overview

Application supports the following forecasting methods:

- **Regression**: The classical regression model is useful in identifying seasonal demands and casual-driven effects of holidays and price.
- **Ridge Regression**: Regression which safeguards against one or more causal factors getting dramatically larger affects than others. It is often similar to regression.
- **Log Transformed Regression**: Regression on a log transformed demand pattern. Useful to smooth out variance which cannot be easily explained in demand. It is best suited for highly variable demand patterns.
- **Holt Exponential Smoothing**: Use this method for instances where the amount of data is limited, such as newly introduced products. It creates a level-driven forecast without seasonality or other causal factors.
- **Croston Method for Sparse Demand**: Use this method when a large amount of historical data is intermittent or spare. This method evaluates periodicity of demand.
- **Regression for Sparse Demand**: Useful for sparse demand where there are still some seasonal or causal driven impacts.

When you forecast using a demand plan:

- Each item-organization which has historical demand is analyzed separately.
- The analysis automatically removes any zero demand entries and fills the missing historical data.
- The analysis also identifies peaks and valleys in the history that are erroneous information or outliers.
- The forecasting process evaluates which of the predefined forecasting methods are most appropriate for analyzing the particular item-organization's historical demand and selects one or more forecasting methods.

Working with Predefined Causal Factors: Explained

You use causal factors to understand the variation in historical demand and produce a highly accurate and adaptive forecast. You have 27 causal factors that you can use during the forecasting process to evaluate each item-organization and determine the impacts.

The causal factors include:

- 12 months of the year
- 7 days of the week when forecasting using daily data
- Trend
- Price
- 6 holidays (They include New Year's, Thanksgiving, Christmas, and three placeholder holidays. You can use these to model any other holidays.)

*Note:* Except for Price, all causal factors have a dimension of Time only and do not vary by item and organization.
Modifying Causal Factors
You can modify and repurpose causal factors to meet the demand planning needs. Since all causal factors are on shared measures, changes to one plan’s causal factor values impacts other plans simultaneously. Typically, you load the causal factor data from a flat file and then modify as required.

To modify a causal factor:

1. Open a demand plan with history and horizon that matches the causal dates.
2. Create a table displaying the causal factor measure and relevant time period.
3. Modify the values of the causal factor and save. Next time you run any plan, the changes to the causal factor can impact the forecast.

Modifying Demand Exceptions and Overriding Demand Forecast: Explained
You open a demand plan and open the exceptions table to view the demand exceptions. The exception table shows any demand exception with at least one exception.

You can use the search capabilities to focus on specific areas of exceptions, such as:

- Exception Date
- Specification values
- Organization
- Product

Modifying Demand Exceptions
You can modify the threshold associated with each demand exceptions to meet your business requirements. In addition, you can also modify the data aggregation level at which the measure is evaluated. Typically, when you calculate at a lower level, an exception returns more occurrences for the same threshold than when set at a higher level.

The reduction in exceptions is tied to two factors:

- Less data points to evaluate at a higher level.
- A large amount of data variability and noise that occurs at lower levels is reduced in aggregation. Hence, it is recommended that the threshold and levels be set to the most business-meaningful levels. For example, if the primary use of forecast is to ensure enough is produced, then organization aggregation should be increased from organization to line of business.

Overriding Demand Forecast
Based on business information and intelligence, you can override the statistical forecast.

To perform a forecast override:

1. Open the relevant plan and open a table with the forecast measures.
   The table must contain the dimension and hierarchies that you want to view the data. You can use a table with several hierarchies and levels and collapse or expand a hierarchy until they see the relevant data aggregation.
2. Double-click the cell and enter the desired value to enter an override. When you navigate away from the cell, the calculated measure associated with the override measure changes immediately.

3. Click **Save**. Close the table without saving to discard any unsaved changes.

## Approving a Demand Plan: Explained

As a demand planner, you typically follow a weekly or monthly planning cycle. During this cycle, you can review different forecasts and try different scenarios in an effort to get to the most appropriate future projection of demand. After the cycle is complete, it is best practice to take a snapshot or archive forecast results so that it can remain static while the next forecast cycle begins. You can reuse the static forecast as an input for other processes.

In your Supply Chain Planning application, you can set aside the demand forecast and save using the Approve action. After a forecast is approved, the approved values remain unchanged until the forecast is approved again.

> **Note:** A plan approval is a recommended step, but not mandatory in the demand planning.

The following illustration is a visual representation of the demand planning process and shows how plan approval interacts.

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### Related Topics
- Understanding Plan Approval Process, Plan Attributes, and Plan Status: Explained
When do I run a demand plan?

You run a demand plan depending on your organization’s demand forecasting cycle, which is typically either weekly or monthly. You also run a demand plan when major changes have been made to historical data or causal factors, or when new products have been added.
8 **Manage Supply Plans**

Managing Supply Plans

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Use this generic procedure to create and run a plan:

1. In the Navigator, click a Supply Chain Planning work area link.
2. Click the **Tasks** panel tab.
3. In the **Tasks** panel drawer, click the **Manage Plans** link.
4. In the **Search Results** region, from the Actions menu, select **Create**.
5. Complete the following information for the plan:
   a. Enter a name.
   b. (Optional) Provide a description for the plan.
   c. Select the plan type.
   d. (Optional) Select the **Enable for OTBI reporting** check box to make measures from a plan available in Oracle Transactional Business Intelligence (OTBI) for reporting.
   e. Select the owner.
   f. Define the access level:
      i. Select **Public** to make the plan accessible for all users.
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6. Based on the type of plan that you selected, complete the required information in one or more tabs (Scope, Demand, Safety Stock, and Supply).
7. Click **Save and Close**.
8. Click **Actions** menu and select **Run**.

Related Topics

- Copying a Plan: Procedure
- Viewing a Plan: Procedure

Copying a Plan: Procedure

You can create plans and then duplicate them to save time and perform planning activities incrementally. For example, you have defined the line of business associated with an existing plan, such as organizations and items. You can create a copy from that existing plan rather than define a new plan.
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   d. Enter the search parameters and click the Search button.
   e. In the Search Results region, select the plan that you want to copy, click Actions, and then select Duplicate.

2. In the Create Plan dialog box, complete the following information for the plan:
   a. Select a copy type:
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        Typically, when you duplicate the plan with the Copy plan options only option, the next step is to edit the plan options before running the plan.
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   d. (Optional) Select the **Load plan after copy** check box. This check box is not available for Demand Plan or Sales and Operations Plan types.
   e. Select the owner.

3. Click **Save and Close**

**Related Topics**
- Creating a Plan: Procedure
- Viewing a Plan: Procedure
Viewing a Plan: Procedure

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

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Related Topics

• Creating a Plan: Procedure

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

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

• Select the Enable for OTBI reporting check box on the Plan Options page of your supply, demand, or sales and operations plan.
Note: You must run the plan after you enable it for OTBI reporting.

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

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

Accessing the OTBI Reports

To access the OTBI reports:

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

The OTBI report opens in the context of the current, open plan.

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

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

Available Measures

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

- Configure to Order Forecast Metrics: The following configure to order forecast metrics are available for demand plans, and demand and supply plans:
  - Final Option Demand Forecast
  - Final Planning Percent
  - Option Demand Forecast

  Configure to order forecast metrics support dimensions, such as Plan, Time, Product, Organization, Customer, Top Model, and Demand Class.
• Demand Management Metrics: The following demand management metrics are available for demand plans, and demand and supply plans:
  o Bookings Forecast
  o Bookings History
  o Bookings History Value
  o Final Bookings Forecast
  o Final Shipments Forecast
  o Shipments Forecast
  o Shipments Forecast Value
  o Shipments History
  o Shipments History Value
  Demand management metrics support dimensions, such as Time, Product, Organization, Customer, and Demand Class.

• Exception Metrics: The following exception metrics are available for supply plans, and demand and supply plans:
  o Exception Count
  o Exception Quantity
  o Exception Days
  o Exception Ratio
  o Exception Value
  Exception metrics support dimensions, such as Plan, Time, Product, Organization, Customer, Supplier, Manufacturing Resource, and Exception Type.

• Order Metrics: The following order metrics are available for supply plans, and demand and supply plans:
  o Order Quantity
  o Implemented Supply Quantity
  o Order Value
  Order metrics support dimensions, such as Plan, Time, Product, Organization, Order Details, and Order Type.

• Pegging Metrics: The following pegging metric is available for supply plans, and demand and supply plans:
  o Pegged Quantity
  Pegging metric supports dimensions, such as Plan, Time, Product, Organization, Customer, Supplier, End Demand, and Order Type.

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

Sales Forecast Value

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

Defining Scope Plan Options: Explained

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

The Scope tab includes the following sections:

- Plan Organizations
- Forecasting Items (available only for demand plans or demand and supply plans)
- Supply Planned Items (available only for supply plans or demand and supply plans)
- Plan Parameters

Plan Organizations

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

Forecasting Items

Specify a hierarchy, level, and level members by which to filter specific items for demand planning. Your selections are used in conjunction with your selections in the Plan Organizations section. Items that belong to a parent level will be included. Fields in this section are not required. However, if you do not specify a hierarchy, level, and level members, then you cannot filter supply planned items. In this situation, your plan will include all planned items in the selected organizations, which can have performance implications.

Note: The Forecasting Items section is not available for supply-only plans.

Supply Planned Items

For Supply Planned Item Type, select Manufacturing Plan (MRP) or Production Plan (MPS).

For Supply Planned Items, select the option to control the items to include in the supply plan. Options are:

- All planned items: This option can have performance implications.
- Demand plan items and all sales orders
- Demand plan and WIP components
- Demand plan items only
- Demand plan items, WIP components, and all sales orders
Note: The Supply Planned Items section is not available for demand-only plans.

Plan Parameters

The Plan Parameters section is available for demand, supply, and demand and supply plans. The following table describes the plan parameters.

The following table describes the plan parameters.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan Horizon Days</td>
<td>Number of days in the plan. Set horizon days to forecast and plan for future needs. Minimize horizon days to avoid long-running plans. Default is 180 days.</td>
</tr>
<tr>
<td>Forecasting Calendar</td>
<td>Calendar used for forecasting and setting time level. The calendar must belong to the dimension catalog associated with the plan. Available for demand or supply and demand plan types.</td>
</tr>
<tr>
<td>Forecasting Time Level</td>
<td>Time level used by forecast profiles. Time levels vary, depending on the selected forecasting calendar. Default value is Week. Available for demand or supply and demand plan types.</td>
</tr>
<tr>
<td>Measure Catalog</td>
<td>Group multiple sets of measures for use in a plan. By enabling only those measures that are needed for any specific plan, you can perform a focused analysis with improved performance. A planning administrator can create and modify measure catalogs.</td>
</tr>
<tr>
<td>Price Lists</td>
<td>Price list used in revenue calculations. The default price list for use in value calculations is Item List Price, defined in Items table for Organization and Item.</td>
</tr>
<tr>
<td>Exception Set</td>
<td>Lists exceptions to compute as part of a plan and also filters on Organizations and Categories for computing exceptions.</td>
</tr>
<tr>
<td>Simulation Set</td>
<td>Lists simulation sets to use in your plan. A simulation set is a set of adjustments to plan inputs. Apply a simulation set to a plan to model different business scenarios.</td>
</tr>
</tbody>
</table>

Related Topics

- Managing Plans: Explained
- Dimensions and Dimension Catalogs: Explained

Defining Safety Stock Parameters

Safety Stock Planning Methods: Explained

You can select a Safety Stock Planning Method to plan safety stock for your plan. Use the Supply Planning, Planning Central, or Demand and Supply work area to open the Plan Options page, Safety Stock tab, where you can select the safety stock planning method.
The following are the four safety stock planning methods from which to select:

- Do not plan safety stock
- User-specified values for all items
- Statistical safety stock for end items, none for all others
- Statistical for end items, user-specified for all others

**Note:** The safety stock override is used and the planning process does not calculate any values for items when the following applies:

- If the **Apply the override quantities for safety stock** check box is selected for the plan.
- If a planned item has its safety stock override item attribute set to Not Null.

**Do Not Plan Safety Stock**
Select this method if you do not want safety stock calculated or planned for any item in the plan.

If you select this method, the Parameters for Safety Stock Calculations and Parameters for Safety Stock Smoothing sections are not available.

**User-Specified Values for All Items**
Select this method to plan safety stock for all items based on the safety stock method for each item. In this case, safety stock planning does not consider statistical safety stock parameters. With this option the planning process calculates safety stock in one or more of the following ways:

- If the Safety Stock Planning Method item attribute is set to Non-MRP Planned, then you can upload safety stock quantities by using CSV files for those items.
- If the Safety Stock Planning Method item attribute is set to Days of cover, then the planning process calculates safety stock based on the user-specified days of cover for those items.
- If the Safety Stock Planning Method item attribute is blank, the planning process does not plan safety stock.

If you select this method, the Parameters for Safety Stock Calculation section is editable. However, the Parameters for Safety Stock Smoothing section is not available.

**Statistical Safety Stock for End Items, None for All Others**
Select this method to plan safety stock only for the end items that have statistical safety stock parameters defined for them. The planning process does not plan safety stock for items that do not have forecasts defined.

If you select this method, the Parameters for Safety Stock Calculation section is editable. Statistical safety stock is calculated with parameters specified at either the item level or at the measure level.

Because statistical safety stock is a single value, smoothing parameters do not apply to it, so the Parameters for Safety Stock Smoothing section is not available.

**Statistical for End Items, User-Specified for All Others**
Select this method to calculate and plan statistical safety stock for end items and user-specified safety stock for all other items.

If you select this method, the Parameters for Safety Stock Calculations and Parameters for Safety Stock Smoothing sections are available.
Defining Parameters for Safety Stock Calculation: Explained

You can configure parameters in which to calculate safety stock quantities as part of Run Plan. The safety stock calculation process outputs to plan data for the related safety stock fields for each item-organization attribute. The process calculates statistical safety stock levels based on forecasts and forecast error measures.

Define or modify safety stock plan options on the Plan Options page, Safety Stock tab. The safety stock calculation process also outputs values to the plan simulation set specified on the Plan Options page, Scope tab.

Note: The Parameters for Safety Stock Calculations section is available only when one of the following safety stock planning methods is selected:
- Statistical safety stock for end items, none for all others
- Statistical for end items, user-specified for all others

Calculate Safety Stock

Select Calculate new safety stock quantities for end items so that safety stock can be calculated for end items in a supply plan run. When selected, the safety stock parameters are enabled.

The following table lists safety stock calculation parameters that you can select or configure.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use item-specific values</td>
<td>Select to specify whether the supply plan run uses item-specific values in safety stock calculations.</td>
</tr>
<tr>
<td>Service Level Percentage</td>
<td>Enter a value between 0 and 100 to set the level of customer service that you want in satisfying the product demand immediately out of inventory.</td>
</tr>
<tr>
<td>Safety Stock Forecast Plan</td>
<td>The demand plan from which to select the forecast, forecast error, intermittent demand, and average interarrival time measures.</td>
</tr>
<tr>
<td>Forecast</td>
<td>Forecast measure in the plan used in the safety stock calculations.</td>
</tr>
<tr>
<td>Forecast Error Type</td>
<td>Determines whether the quality of a forecast is measured by using MAD, MAPE, or Intermittent.</td>
</tr>
<tr>
<td>Forecast Error</td>
<td>Forecast accuracy measure in the plan used in the safety stock calculations. If Forecast Error Type is selected, then this field is determined.</td>
</tr>
<tr>
<td>Intermittent Demand</td>
<td>Plan measure that indicates whether or not the demand has an irregular frequency.</td>
</tr>
<tr>
<td>Average Interarrival Time</td>
<td>Plan measure containing average interarrival times used in safety stock calculations for level combinations flagged as intermittent.</td>
</tr>
<tr>
<td>Overwrite</td>
<td>Select a value to use to overwrite the previously generated or entered safety stock levels.</td>
</tr>
<tr>
<td>Save to collected data</td>
<td>If selected, then the collected data is updated with the safety stock quantities that are calculated and with safety stock quantity overrides.</td>
</tr>
</tbody>
</table>
Defining Parameters for Safety Stock Smoothing: Critical Choices

You use the Parameters for Safety Stock Smoothing section on the Plan Options page, Safety Stock tab to configure the following options:

- Apply safety stock change interval to all items
- Smoothing method to calculate safety stock within change interval
- Safety stock change interval in days
- Safety stock bucket start offset days
- Maximum percentage variation in safety stock values
- Minimum percentage variation in safety stock values

**Note:** The Parameters for Safety Stock Smoothing section on the Plan Options page, Safety Stock tab is available only when one of the following safety stock planning methods is selected:

- User-specified values for all others
- Statistical for end items, user-specified for all others

**Apply Safety Stock Change Interval to All Items**

If you enable this option, the planning process applies safety stock change interval to all items. If you disable this option, then the safety stock change interval applies only to items with Days of Cover safety stock method. Safety stock change interval is the time interval used for the smoothing within time interval functionality. If you specify an interval of 20 days, then starting from the application date, the planning process groups the safety stock calculation in 20-day buckets. The planning process then uses the smoothing method to calculate the safety stock within change interval to determine the safety stock level for the bucket.

**Smoothing Method to Calculate Safety Stock Within Change Interval**

Use this option for smoothing raw safety stock quantities in every interval, starting from the plan horizon. You can select Minimum, Maximum, or Average from the drop-down list. The result is always rounded up to nearest integer.

**Safety Stock Change Interval in Days**

Safety stock change interval is the number of working days used for smoothing safety stock within the time interval. If you specify an interval of 20 days, then starting from the application date, the planning process groups the safety stock calculation in 20-day buckets. The planning process then uses Smoothing method to calculate the safety stock within change interval to determine the safety stock level for the bucket. Enter a value greater than zero (0).

**Safety Stock Bucket Start Offset Days**

Use the current day for this option to ignore the impacts of high near-term demand that is possible due to high backlog demand. Enter a value greater than zero (0).

**Maximum Percentage Variation in Safety Stock Values**

When you use this option, the planning process does not let the safety stock deviate by more than the specified value when changing the time interval. Enter a value greater than zero (0). For example, if you specify 25 percent, the planning process sets 25 percent as the maximum percentage of change in safety stock quantity between buckets.
Minimum Percentage Variation in Safety Stock Values
When you use this option, the planning process keeps the safety stock constant across time intervals if the deviation is within the specified percentage. Enter a value greater than zero (0).

Supply Plan Inputs

Supply Plan Attributes: Critical Choices
You can describe the generic attributes of a supply plan, such as plan start date, end date, and time fence control on the Edit Plan Options page, Supply tab, General tab. Plan Start Date and Plan End Date are read-only fields. The planning process calculates the plan end date from the Plan Horizon Date that you define in the Scope tab. Plan End Date is the sum of Plan Start Date and Plan Horizon Date. You use the Supply Plan Attribute section to configure the following options:

- Time fence control
- Assignment set

Demand Time Fence Control
When you enable this option, planning calculations ignore forecast demands before the demand time fence date and considers only sales order demand when calculating gross requirements. Demand time fence is the time duration within which the planning process does not consider forecast demand when calculating actual demand. The demand time fence start date is the current date and the end date is specified by users.

Planning Time Fence Control
Planning time fence is the time duration within which the planning process does not alter the plan. For planned items within the planning fence, the planning process does not reschedule in order due dates or create planned orders for the item to satisfy net demand requirements. This applies to all order types including make, buy, and transfers.

However, the planning process can reschedule out or cancel an order when it determines that such an order creates excess supply. For planned items outside the planning time fence, the planning process can generate suggestions to create, reschedule, or cancel supplies in the plan.

The planning process calculates a planning time fence date for each planned item. The date is calculated based on the values of the item attributes Planning Time Fence Type and Planning Time Fence Days. The date is calculated based on the working days in the organization calendar. For all planned orders, the suggested due date cannot be earlier than the planning time fence date.

Assignment Set
Assignment Set includes the sourcing rules (hierarchy) and bills of distribution (BOD) for material flow within the supply chain. If you have already created assignment sets, you can select the required assignment set from the drop-down list. You can create an assignment set in Manage Assignment Sets from the Tasks panel drawer.

Overwrite Firm Planned Orders
You use this option to determine whether firm planned orders are retained between plan runs. When you select All from the drop-down list, the planning process overwrites all entries, planned and firm planned, from the current material plan. When you select None from the drop-down list, the planning process does not overwrite any firm planned orders. However, it overwrites any suggested planned orders that are not firm.
To navigate to the Supply Plan Attributes section, follow these steps:

1. On the Edit Plan page, click the Tasks panel drawer.
2. In the Tasks panel drawer, click **Manage Plans**.
3. In the Search area, search for your plan.
4. Select the plan from the displayed search result. Click Actions and then click Edit Plan Options.
5. On the Edit Plan Options page, click the Supply tab.

The General tab displays, which include the Supply Plan Attributes section.

### Forecast Processing: Explained

Forecast processing is the process by which supply planning extracts and adjusts historical forecast data from demand planning to meet the actual demand created by a sales order.

You can specify forecast processing on the Plan Options page, Supply tab, General subtab. You can define the following aspects of forecast processing:

- Forecast Spreading
- Forecast Consumption

#### Forecast Spreading

Forecast processing adjusts the forecast received from demand planning to make it suitable for supply planning. The planning process breaks down the forecast received from demand planning to the day level. This is known as forecast spreading.

For example, if the monthly demand forecast is 100 and you enable forecast spreading, and if there are 20 working days in the month, the planning process spreads the forecast quantity of 5 to each daily bucket.

💡 **Tip:** You can select the Enable the Rounding item attribute in the product data model or a simulation set. This ensures that the spread forecast is in integers and helps to plan for items which are not divisible.

You can only spread demand forecast evenly across all working days. Working days are determined by the calendar that you select from the Forecast Spreading Calendar drop-down list on the Plan Options page, Supply tab, General subtab, in the Allocation and Consumption section.

Select one of the following forecast spreading options:

- Spread forecast evenly: The planning process spreads forecast to daily buckets if the demand is planned at a weekly or monthly level.
- Do not spread forecast: The planning process retains the forecast at the weekly or monthly level and places the forecast at the beginning of the week or month. In the first week or first month of the plan, the planning process places the forecast at the first day of the week or the first day of the month.

You should also set the Past Due Forecast Days value on the Organizations tab of the Maintain Supply Network Model page. The planning process then aggregates all the forecasts within the past due dates of the plan and places the result at the plan start.

#### Forecast Consumption

Forecast consumption is the process that replaces forecast demand with sales order demand. Each time you place a sales order, you create actual demand. If you forecast actual demand, you want to reduce the forecast demand by the sales order quantity to avoid overstating demand.
If you select the **Consume by forecast bucket** check box and specify values for the options Backward Days and Forward Days in the Forecast Allocation and Consumption section, forecast consumption is affected. These choices create a forecast consumption window of time that consists of the backward and forward consumption days added to the sales order line schedule date.

For example, you specify 5 backward and 5 forward days and the forecast is in daily buckets. The consumption search first moves 5 days backward from the forecast bucket in weekdays, looking for a forecast quantity to consume. If that search is unsuccessful, consumption moves 5 days forward from the forecast bucket in weekdays. You can add an overconsumption entry to the forecast if either of the following scenarios occurs:

- When a match between the sales order and forecast dates is not found
- When the consumed forecast quantity is not sufficient to cover the sales order quantity

You can also specify forecast consumption for a plan by defining the following options on the Supply: Advanced Options page in the Forecast Consumption Parameters section:

- Consume forecast inside demand fence
- Consume forecast with no demand class
- Prefer consumption within forecast bucket

### Forecast Allocation and Consumption: Critical Choices

You can configure the following items in the Forecast Allocation and Consumption section on the Edit Plan Options page in one of the Supply Chain Planning work areas:

- Forecast spreading
- Forecast spreading calendar
- Consume by forecast bucket
- Backward days
- Forward days

#### Forecast Spreading

Use this option to decide whether to spread the forecast evenly or not to spread the forecast at all.

If you select **Spread forecast evenly**, the planning process spreads the forecast to daily buckets if the demand is planned at a weekly or monthly level.

If you select **Do not spread forecast**, the planning process retains the forecast at the weekly or monthly level and places the forecast at the beginning of the week or month. In the first week or first month of the plan, the planning process places the forecast at the first day of the week or the first day of the month.

#### Forecast Spreading Calendar

Use this option to select the calendar of your choice to implement forecast spreading. Select one of the calendars from the drop-down list.

#### Consume by Forecast Bucket

When you enable this option, the forecast consumption process does not search for forecasts and sales orders outside the consumption bucket. If you enable this option, then you cannot specify Backward Days and Forward Days.
Backward Days
Use this option to allow a sales order demand to consume the forecast demand even if the forecast demand is a specified number of days earlier than the sales order demand. The value must be greater than zero.

Forward Days
Use this option to allow a sales order demand to consume the forecast demand even if the forecast demand is a specified number of days later than the sales order demand. The value must be greater than zero.

To navigate to the Forecast Allocation and Consumption section, follow these steps:

1. On the Edit Plan page, click the Tasks panel drawer.
2. In the Tasks panel drawer, click Manage Plans.
3. In the Search area, search for your plan.
4. Select the plan from the displayed search result. Click Actions and then click Edit Plan Options.
5. On the Edit Plan Options page, click the Supply tab.

The General tab appears. This tab includes the Forecast Allocation and Consumption section.

Automatic Release Parameters: Critical Choices
Automatic release uses scheduled processes to release planned orders automatically after the plan run completes. The following options are available in the Automatic Release Parameters section on the Edit Plan Options page in one of the Supply Chain Planning work areas:

- Release planned orders automatically
- Include rescheduled supplies in automatic release

Release Planned Orders Automatically
When you enable this option, the planning process releases the planned orders automatically within the release time fence after the plan runs successfully.

Note: Release time fence is an item-organization attribute and is not defined in plan options.

Include Rescheduled Supplies in Automatic Releases
When you enable this option, the planning process automatically releases rescheduled supplies. This option is active only if you have selected Release Planned Orders Automatically.

To navigate to the Automatic Release Parameters section, follow these steps:

1. On the Edit Plan page, click the Tasks panel drawer.
2. In the Tasks panel drawer, click Manage Plans.
3. In the Search area, search for your plan.
4. Select the plan from the displayed search result. Click Actions and then click Edit Plan Options.
5. On the Edit Plan Options page, click the Supply tab.

The General tab appears. The Automatic Release Parameters section is a part of this tab.
Horizon for Average Daily Demand: Explained

You use Average Daily Demand to calculate Projected Available Balance: Days of Cover. Specify a value greater than zero (0). The default value is seven. You can configure the average daily demand in the Supply: Advanced Options dialog box.

Include Drop Ship Demands and Supplies: Explained

When you select this option in the Supply: Advanced Options dialog box, all drop ship demands and supplies for planned source systems are included in the planning process. Supply chain planning supports only one source system per plan. Item-organization attributes for the drop ship validation organization are included by the snapshot. Drop ship validation organization is defined in the Organization tab of manage supply network. If you do not select this option, the planning process removes drop ship demands and supplies from the plan.

Forecast Consumption Parameters: Critical Choices

You use the Forecast Consumption Parameters section to configure the following options on the Edit Plan Options page in one of the Supply Chain Planning work areas:

- Consume forecast inside demand time fence
- Consume forecast with no demand class
- Prefer consumption within forecast bracket

Consume Forecast Inside Demand Time Fence

When you enable this option, forecast consumption occurs before enforcing the demand time fence control. The forecast entries within the demand time fence are used for consumption but not as a demand. After consumption, the demand quantity for all the forecast entries within the demand time fence is zero.

When you disable this option, the demand time fence control is implemented before the forecast consumption. Forecast entries in the demand time fence are dropped as demand statements and are not used for consumption.

Consume Forecast with No Demand Class

Use this option to instruct the forecast consumption process about the order it should use to consume forecast entries when some of forecasts have a demand class and others do not have a demand class. When you select **Within each bucket** from the drop-down list, the forecast consumption process starts by consuming forecast entries on the day of the sales order. At first, it consumes entries with matching demand class and then entries with no demand class. Then it consumes forecast entries within the backward and forward consumption days. For each day, it uses the matching demand class first and then the no demand class.

When you select **After consuming demand-specific forecast** from the drop-down list, the forecast consumption process starts by consuming forecast entries on the day of the sales orders with matching demand class only. Then it consumes forecast entries within the backward and forward consumption days with matching demand class only. If there are any remaining sales order quantity, it repeats the process for forecast entries with no demand class. At first the process runs on the day of the sales order and then within the backward and forward consumption days.
Prefer Consumption within Forecast Bracket

If you enable the option, the planning process consumes the forecast within the forecast bucket. This option is dependent on your selections in the Forecast Allocation and Consumption section in the General tab. This option takes effect when you enable **Spread Forecast Evenly for Forecast Spreading** and disable **Consume by Forecast Bucket** in the General tab.

To navigate to the Forecast Consumption Parameters section, follow these steps:

1. On the Edit Plan page, click the Tasks panel drawer.
2. In the Tasks panel drawer, click **Manage Plans**.
3. In the Search area, search for your plan.
4. Select the plan from the displayed search result. Click Actions and then click Edit Plan Options.
5. On the Edit Plan Options page, click the Supply tab.
6. On the General tab, click Select Advanced Options.

The Supply: Advanced Options dialog box opens, which include the Forecast Consumption Parameters section.

Supplier Capacity Parameters: Critical Choices

You use the Supplier Capacity Parameters section to configure the following options on the Edit Plan Options page in one of the Supply Chain Planning work areas:

- Consume supplier capacity with purchase order
- Supplier capacity accumulation multiplier

Consume Supplier Capacity with Purchase Order

When you select the check box, the planning process consumes supplier capacity with all purchase orders. When you do not select the check box, the planning process consumes supplier capacity with planned orders.

Supplier Capacity Accumulation Multiplier

Use this option to set the date for the planning process to begin the supplier capacity accumulation. You provide a number which acts as a multiplier of the Supplier Item Processing Lead-time. The number must be greater than zero. Supplier capacity is the number of units per day for a specific item that the supplier can produce. To decide the date, the planning process uses the following formula for supplier capacity accumulation:

\[ \text{Multiplier} \times \text{Processing lead time} + 1 \]

For example, if the multiplier = 2 and the processing lead time = 7 days, then the supplier capacity accumulation begins on day 15.

To navigate to the Supplier Capacity Parameters section, follow these steps:

1. On the Edit Plan page, click the Tasks panel drawer.
2. In the Tasks panel drawer, click **Manage Plans**.
3. In the Search area, search for your plan.
4. Select the plan from the displayed search result. Click Actions and then click Edit Plan Options.
5. On the Edit Plan Options page, click the Supply tab.
6. On the General tab, click Select Advanced Options.

The Supply: Advanced Options dialog box opens, which include the Supplier Capacity Parameters section.
Release Recommendations Parameters: Critical Choices

You use the Release Recommendation Parameters section to configure the following options on the Edit Plan Options page in one of the Supply Chain Planning work areas:

- Compression days tolerance for automatic release
- Requisition load group by
- Transfer load group by
- Release only by user

Compress Days Tolerance for Automatic Release

Use this option to indicate the number of compression days allowed for the automatic release of planned orders. The number of compression days applies to automatic release of planned orders and recommendations only. Compression days mean the number of days reduced between the start date and due date as suggested by the planning process.

Requisition Load Group By

Use this option to indicate the requisition load group when loading requisitions to purchasing. For each option, except All, the planning process creates one line for each planned order within each requisition.

- When you select All from the drop-down list, the planning process creates one purchase requisition for all recommended orders.
- When you select Item from the drop-down list, the planning process creates one purchase requisition for each item.
- When you select Buyer from the drop-down list, the planning process creates one purchase requisition for each buyer.
- When you select Planner from the drop-down list, the planning process creates one purchase requisition for each planner.
- When you select Supplier from the drop-down list, the planning process creates one purchase requisition for each supplier.
- When you select Category from the drop-down list, the planning process creates one purchase requisition for each item category.
- When you select Location from the drop-down list, the planning process creates one purchase requisition for each location.

Transfer Load Group By

Use this option to indicate the transfer load group when loading transfers to logistics. The value of Transfer Load Group By determines how the actual transfer order is created. When you select All from the drop-down list, the planning process creates all transfers in one transfer order. When you select Source and destination and ship date from the drop-down list, the planning process creates one transfer order for each Ship From and Ship To organization, and each ship date. When you select Source and destination, shipping method and ship date from the drop-down list, the planning process creates one transfer for each Ship From and Ship To organization pair, and ship method and ship date.
Release Only by User

Use this option to specify whether to restrict implementation of planned orders and recommendations to the current user. If you enable this option, the planning process implements only those planned orders and recommendations that the current user has marked. If you disable this option, the planning process implements planned orders and recommendations that are marked by any user.

Note: This option applies only to the manual release of planned orders.

To navigate to the Release Recommendation Parameters section, follow these steps:

1. On the Edit Plan page, click the Tasks panel drawer.
2. In the Tasks panel drawer, click Manage Plans.
3. In the Search area, search for your plan.
4. Select the plan from the displayed search result. Click Actions and then click Edit Plan Options.
5. On the Edit Plan Options page, click the Supply tab.
6. On the General tab, click Select Advanced Options.

The Supply: Advanced Options dialog box opens, which include the Release Recommendation Parameters section.

Time Fence Parameters: Critical Choices

You use the Time Fence Parameters section to configure the following options:

- Create time fence
- Create firm planned order time fence
- Create firm internal requisition time fence

Create Time Fence

Use this option to instruct the planning process to create a natural time fence for an item at the completion date of the latest firm discrete job, purchase order, flow schedule, or shipment. The natural time fence indicates a new time fence that is set at the latest date of firm supplies. Completion date means the due date of the supply.

Note: This advanced plan option has no effect if you do not enable the Planning Time Fence Control option in the General tab.

Create Firm Planned Order Time Fence

Use this option to instruct the planning process to create a natural time fence for an item at the completion date of the latest firm planned order. Completion date means the suggested due date of the firm planned order.

Note: This advanced plan option has no effect if you do not enable the Planning Time Fence Control option in the General tab.

Create Firm Internal Requisition Time Fence

Use this option to instruct the planning process to create a natural time fence for an item at the completion date of the latest firm internal requisition. Completion date means the suggested due date of the internal requisition.
Note: This advanced plan option has no effect if you do not enable the Planning Time Fence Control option in the General tab.

To navigate to the Fence Parameters section, follow these steps:

1. On the Edit Plan page, click the Tasks panel drawer.
2. In the Tasks panel drawer, click Manage Plans.
3. In the Search area, search for your plan.
4. Select the plan from the displayed search result. Click Actions and then click Edit Plan Options.
5. On the Edit Plan Options page, click the Supply tab.
6. On the General tab, click Select Advanced Options.

The Supply: Advanced Options dialog box opens, which includes the Fence Parameters section.

Technical Control Parameters: Explained

When you enable this option, the planning process implements multithreading during the plan run. Multithreading decreases the overall run time of a plan. To enable this option, click Select Advanced Options in the General tab of a supply plan and select Enable multithreading on the Supply: Advanced Options dialog box.

Why can't I select Supply Planned Items?

The Supply Planned Items option is inactive until you select level members in the Forecasting Items section. When Supply Planned Items is inactive, the planning process considers that all level members are selected.

Supply Plan Options for Organizations and Schedules: Explained

Use the Organizations and Schedules subtab on the Plan Options page to configure subinventory netting, demand and supply netting, and the forecast spreading calendar, depending on the organization for a supply plan. You can also specify the demands that you want to consider in the supply plan.

Configure the supply plan options for organizations and demand schedules on the Create Plan page, Supply tab, Organizations and Schedules subtab, or the Edit Plan Options page, Supply tab, Organizations and Schedules subtab.

Organizations

The organizations are based on the organization level members that you specify on the Scope tab of the Plan Options page.

Subinventories Netting: Enable or disable subinventories that you want to include in the netting. The subinventories are based on the organization. During data collections, the planning process collects the organization based on your configuration of the organization in the source system. If you enable the subinventory netting for a new subinventory in the source, the plan automatically includes the new subinventories that are collected after the initial plan run.
Demand and Supply Netting: Run plans with only demands or supply types depending on your requirement. You can include or exclude sales orders, reservations, on hand, purchases, transfers, and work orders for each organization in your plan. A new plan enables all the demand and supply netting options by default.

Forecast Spreading Calendar: Select a user-defined forecast spreading calendar for each organization.

- The supply planning process uses the calendar to spread aggregate forecast demand across daily buckets.
- If you do not specify any calendar at the organization level, then the supply planning process spreads the aggregate forecast evenly across daily buckets.
- The planning process uses this calendar only when you select the User-defined calendar value for the Forecast Spreading Calendar attribute in the Forecast Allocation and Consumption section. The Forecast Allocation and Consumption section is available on the Plan Options page, Supply tab, General subtab.

Demand Schedules

Select the demands to include in the supply plan. If the plan type is demand and supply, the demand schedule is automatically included in the supply plan. The supported types of demand schedules are:

- Demand (demand plan)
- External (external forecast)
- Production (production plan used in manufacturing plan)

Demand Plan Output: Select an output measure from the list of output level measures associated with the demand plan. The output measure from the demand plan must be included in the supply plan's measure catalog and the demand forecasts measure group.

Measure Levels: Select dimension levels at which to load the measure. If the demand schedule type is external or production, then the measure level option is not available.

Ship-to Consumption Level: Select a forecast consumption level for the local demand plan.

Configuring Measure Levels for Demand Schedules: Explained

You can select dimension levels in the Measure Levels dialog box at which to load measures into a plan. After configuring your measure levels for demand schedules, run your demand plan to generate the forecasts. Next, run the supply plan and then review the Supplies and Demands table.

You can configure dimension levels for a Supply Plan or a Demand and Supply Plan type from a Planning Central, Supply Planning, or Demand and Supply work area. To access the Measure Levels dialog box, navigate to the Plan Options page, Supply tab, Organizations and Schedules subtab. In the Demand Schedules section, click the Select button in the Measure Levels column.

**Note:** If the demand schedule type is External or Production, then the Measure Level option on the Organizations and Schedules subtab is not available.

In the Measure Levels dialog box, you can configure measure levels for the following dimensions:

- **Time:** The time hierarchy and level choices are based on the forecasting calendar used for the demand plan. You set the forecasting calendar on the Plan Options page, Scope tab, in the Plan Parameters section.
• Demand Class: If you leave the Demand Class level and Customer level blank and select Day for the Time level, then the forecast that comes from the demand schedule into supply planning will be aggregated at the item-organization-day level.

• Customer: If you want an aggregated forecast by day or month, leave the customer level blank. If you select Customer Site level, the forecast for each day is broken down into forecasts for each customer site in the demand plan. For example, you have 20 customer sites for your demand plan and select Customer Site level and Day for the Time level. You will see 20 forecasts for each day in the Supplies and Demands table.

• Organization: The organization hierarchy and level are fixed for the organization dimension. The Enterprise hierarchy only supports the Organization level.

• Product: The product hierarchy and level are fixed for the product dimension. The Product hierarchy only supports the Item level.

Running a Supply Plan or an Integrated Plan: Procedure

Run a supply plan or an integrated plan to generate forecasts and safety stock levels and to create replenishment. An integrated plan includes both demand and supply plan. You can run a Supply Plan or a Demand and Supply Plan from the Supply Planning, Planning Central, or Demand and Supply Planning work areas.

When you run a supply plan or an integrated plan, you can specify the scope of the plan that you want to run. You can decide whether to refresh the plan input data before running it. Also, you can run the plan immediately or you can run the plan in the background at a set time or on a repetitive schedule, such as daily or weekly.

After you create a supply plan or a demand and supply plan, you must run the plan to generate the data. In the Run Plan dialog box, Parameters tab, run plan options are sequenced in the order of operations: scope, demand, and supply. You also have an option to recalculate safety stock levels. The forecasting process runs first, safety stock is calculated next, and then the output is used for supply planning calculations. You can configure the following options, depending on the plan type:

• Data Refresh Options
• Scope Options
• Demand Plan Run Options
• Supply Plan Run Options

Data Refresh Options

The following data refresh options are available:

• **Do not refresh with current data**: Select this option to run your plan with no changes to demand, including no advancement of the plan start date.

• **Refresh with selected current data**: Select this option to partially refresh your data. You can refresh transaction data and some reference data without performing a full refresh. For example, selectively refreshing Demand history and measures and Forecasts covers the following scenarios:
  - Demand history and measures: You have reloaded external or third-party forecasts and the plan must reflect these recent updates (for example, Sales Forecast, Marketing Forecast, Financial Forecast, and Shipments Forecasts).
  - Forecast: You have changed the input measure level on the Plan Options page, Supply tab, Organizations and Schedules subtab, in the Demand Schedules section. For example, you copy a plan, change the input measure level to another forecast within the same plan, and want to rerun the plan. In this scenario, specify
the **Refresh with selected current data** option for Forecast. Because you changed the plan options but did not edit the plan, the plan does not require a full refresh.

- **Refresh with current data**: Select this option to refresh the complete plan with the latest collected data. If you are running the plan for the first time, this is the only data refresh option available and it is selected by default. If you select this option for an integrated plan (demand and Supply Plan type), the Plan demand and Plan supply check boxes in the Scope Options section are selected by default and cannot be deselected.

## Scope Options

Scope options restrict the focus of the replan. The following scope options are available:

- **Plan demand**: Select to forecast demand when running a plan. If you selected **Refresh with current data** in the Data Refresh Options section, then this option is selected by default for an integrated plan. This option is available for Demand and Supply Plan types in the Planning Central and Demand and Supply Planning work areas.

- **Approve plan**: Select to approve the plan during the plan run. This option is available for Demand and Supply Plan types in the Demand and Supply Planning work area.

- **Recalculate safety stock**: Select to recalculate safety stock quantities when running a plan. This option is available for Supply Plan or Demand and Supply Plan types in the Planning Central, Supply Planning, and Demand and Supply Planning work areas.

  The Recalculate safety stock check box is available only when one of the following safety stock planning methods is selected on the Plan Options page, Safety Stock tab:

  - Statistical safety stock for end items, none for all others
  - Statistical for end items, user-specified for all others

- **Plan supply**: Select to have the planning process calculate only the supply. If you selected the **Refresh with current data** check box in the Data Refresh Options section, then this option is selected by default for an integrated plan. This option is available for Demand and Supply Plan types in the Planning Central and Demand and Supply Planning work areas.

- **Archive plan**: Select to archive data from the plan. This option is available for Supply Plan or Demand and Supply Plan types in the Supply Planning and Demand and Supply Planning work areas.

## Demand Plan Run Options

The Demand Plan Run Options section is not available for Supply Plan types, but is available to Demand and Supply Plan types.

- **Forecast Profiles**: Select the forecasting profiles that you want to include as part of the plan. If you do not select a forecasting profile, then the forecasting process does not run.

- **Include details of forecast methods**: Select to specify whether to provide details of the forecast methods that make up the forecast. This option is available for Demand and Supply Plan types in the Demand and Supply Planning work area.

- **Include details of causal factors**: Select to specify whether to provide details of the causal factors that make up the forecast. This option is available for Demand and Supply Plan types in the Demand and Supply Planning work area.
Supply Plan Run Options

The following supply plan run options are available:

- **Interactive**: Select this option to run a plan into memory, without saving the plan to the database. If a typical plan is scheduled to run on weekends, you can use the Interactive option to run the plan during the week. If you select Interactive, the Schedule tab is disabled and the plan is set to run as soon as possible.

- **Batch**: Select this option to run the plan per a schedule. When you select this option, the Schedule tab becomes available where you can set up when to run the plan.

Use Batch to save the plan to a database. To save a plan to a database, you must run the plan at least once. The plan will be available for analysis without loading into memory.

The following two options are available for Batch:

- **Save without calculated totals**: Select to exclude calculated totals for items and resources while saving a plan.
- **Save all**: Select to save all plan data, including calculated totals. This option includes calculated totals while saving a plan. For example, save all calculated measures for items in the material plan and for resources used in the resource plan such as Projected Available Balance and Net Resource Availability respectively.

Running a Supply Plan or an Integrated Plan

To run a supply plan or an integrated plan, do the following:

1. Open the Run Plan dialog box:
   a. In the Navigator, click a Supply Chain Planning work area.
   b. Click the Plans panel tab and expand the Plans list.
   c. Select the plan that you want to run, click Actions, and then select Run.
2. In the Run Plan dialog box, Parameters, tab, expand Details to review the plan options:
   a. Review the data refresh options and make appropriate selections.

   - **Note**: If you are running the plan for the first time, you must select **Refresh with Current Data**. This option refreshes historical data, imports sales orders, and advances the plan start date to align with the current date.

   b. Select the scope options that you want for the plan run.
   c. For a Demand and Supply Plan type, select the appropriate demand plan run options, including the forecasting profiles that you want to include as part of the plan run.
   d. Select the supply plan run options that you want for the plan run.
3. If you selected Batch in the Supply Plan Run Options, click the Schedule tab to set up the frequency parameters:
   a. To run the plan immediately, select **As soon as possible**.
   b. To run the plan in the background at a set time, select **Using a schedule** and then select a **Frequency**, such as Daily or Weekly

4. Click **OK** to run the plan.
Supply Planning Concepts

Planning in Daily Buckets: Explained

The planning process always plans in daily buckets because it considers that demands are due at the end of the day. The planning process does not plan demands and supplies at weekly, period, or monthly level. Demands and supplies are balanced at the end of the day. The shortages or excess in demand and supplies are carried over to the next day. However, tables and graphs can aggregate daily planning results into weekly, period, or monthly level.

Demands and supplies do not have time stamps. The planning process considers that the capacity during the day can be used for resource or supplier requirements scheduled for the same day. If a planned work order can be completed in less than a day, it’s scheduled on the same day as the demand due date. Also, if the work order is less than a day, the start date and the end date are same.

The planning process supports two calendars for aggregation in the planning output:

- Fiscal calendars: Supports aggregation by week and period on the pages.
- Julian calendars: Supports daily bucketing and aggregation by calendar month. The Julian calendar does not support bucketing by week.

Requirements Explosion: How it is Processed

When you run a supply plan or a supply and demand plan, one of the processes that take place is requirements explosion for make items. The supply planning processes reviews the supply chain item structure to ensure that there is enough supply, on hand and on order, to meet demand. The shortage of one item creates a demand for the items one level below it in the supply chain item structure. This process of analyzing the demand of individual components that make up an item and creating a demand for those components is known as requirements explosion.

The planning process uses the work definition of make order items to determine component requirements. The planning process makes suggestions accordingly to replenish the components that are in low supply to make the supply of the make order item easier.

Settings that Affect Requirements Explosion for Make Items

Supply planning respects component effective dates. The planning process determines a new date for the planned make order after it takes into consideration the following:

- The components that are part of the work definition
- The operations that are part of the work definition
- The component effective dates for the make item on or before the order start date of the planned order
- The operation effective dates for the make item on or before the order start date of the planned order

**Note:** Requirements explosion is performed only for make items. If you mark a make item as a buy item, the planning process does not suggest replenishing any of its components.
How Requirements Explosion for Make Items is Calculated

Consider the following situation:

- Item A is a make order for which there is a sales order of 100.
- It takes two of item B and three of item C to make one of item A.

The planning process explodes the demand to a component level and creates a demand of 200 for item B and 300 of item C. The demand quantity on an item is the shortage of its parent item multiplied by the usage of the child component in the parent item.

Resource Scheduling: Explained

Resource scheduling can be calculated when you know the planned make order duration. The planning process uses lead times, both fixed and variable, to calculate planned make order duration. For existing work orders, the lead time is the duration of the work order. The planning process does not change the duration of the work order. You can also manually set fixed and manual lead times.

Tip: If you manually configure the lead times, then set larger values for a conservative planning result. Set smaller values for an aggressive planning result.

For example, suppose the fixed lead time = 1

Variable lead time = 0.2.

The planned order size = 10 units

Make planned order lead time = fixed + variable multiplied by order size = 1 + 0.2 multiplied by 10 = 1 + 2 = 3 days

Demand due date = Day 5

Make planned order: Suggested start date = Day 2; Suggested due date = Day 5

The calculation assumes that day 5 ends at 23:59 and so one full day of lead time pushes the start date to day 4 at 23:59. So in the example, the 3-day lead time pushes the start date to day 2.

The following calculations are used to calculate planned make order duration, routing resource duration, operation duration, and resource duration:

- Planned make order duration: The planned make order quantity is determined by total quantity of demands and order modifiers. Total make order lead time (days) = fixed lead time + quantity multiplied with variable lead time.

- Routing resource duration: Resource requirement (in hours) is calculated for item-based resource usages. Resource requirement = Quantity multiplied by Usage hours. Operation duration (in hours) is calculated by adding each resource requirement adjusted for any simultaneous resources. Total Routing Duration = Sum of the operation duration (hours).

- The operation duration and resource duration calculations are shown in the following illustrations. Each operation and resource requirement is spread over the total make lead time.
The following figure illustrates the calculation for operation duration.

\[
\text{Operation Duration (in days)} = \frac{\text{Operation (in hours)} \times \text{Total Make Order Lead Time (in days)}}{\text{Total Routing Duration (in hours)}}
\]

The following figure illustrates the calculation for resource duration.

\[
\text{Resource Duration (in days)} = \frac{\text{Resource Requirement (in hours)} \times \text{Total Make Order Lead Time (in days)}}{\text{Total Routing Duration (in hours)}}
\]

For a planned make order, the planning process performs the following task:

- Calculates duration based on fixed and variable lead times.
- Calculates required resource hours from the work definition.
- Spreads the required resource hours evenly across the calculated work order duration. If the work order has multiple operations, the duration for each operation is calculated and the resource hours are spread out within the operations for assigned resources.

Rescheduling Existing Work Order

For an existing work order, you can either continue with the existing schedule or change the schedule and assign new dates. If the work order is not rescheduled, then the planning process:

- Does not change the work order start and end dates
- Does not change the operation and resource requirement start and end dates
- Spreads each resource usage evenly over the days of the resource requirement

For example, if the resource requirement start date is Day 5 and end date is Day 6, and resource usage is 14 hours, then the planning process allocates 7 hours on Day 5 and 7 hours on Day 6. If you reschedule a work order, the job duration is preserved and does not change. The lead time for each operation and for each resource requirement remain the same. Only the start and end dates change.

Planning calculations follow these guidelines while rescheduling a work order:

- Allocate the same number of days for work order start and end dates. For example, if the end date is moved by two days, then move the start date by two days.
- Allocate the same number of days to each operation and resource requirement date. Using the previous example, move each operation and resource requirement date by two days.
- Spread each resource usage evenly over the days of the resource requirement. For example, if the resource requirement start date is Day 5 and end date is Day 6, and resource usage is 14 hours, then allocate 7 hours on Day 5 and 7 hours on Day 6.
- Adjust for days on and days off by increasing or decreasing the job, operation, and resource dates. Depending on whether days off are included or removed from the work order, the relative working days remain the same before and after the move. For example, the work order duration is 5 days, starting on Friday and ending on Tuesday including two nonworking weekend days. If the work order is rescheduled to start on Monday, the new end date...
becomes Wednesday. If any adjusted dates for the work order are pushed into the past, then place the dates on Day 1 of the plan. If a part of the work order is completed, then only the open quantity of the work order is scheduled. If some components and resources are consumed by the work order, then only the open component requirements and open resource usages are planned in the planning process.

Resource Efficiency and Resource Utilization: Explained

While scheduling resources, the planning process uses resource efficiency and utilization that you specify at the resource level. Resource efficiency is a measure (expressed in percentage) of the actual output to the standard output expected. Resource efficiency determines the time that a resource takes to complete a task.

For example, if you expect a resource having an efficiency of 100% to complete a task in 12 hours, the resource having an efficiency of 50% would take 24 hours to complete the task. Effective usage of a resource is the ratio of resource hours as specified in routing (theoretical usage) to efficiency.

The following figure illustrates the calculation used for actual resource usage.

\[
\text{Actual Resource Usage} = \frac{(\text{Quantity} \times \text{Resource hours per resource})}{(\text{Resource Efficiency} \times \text{Resource Utilization})}
\]

Resource utilization is a measure (expressed in percentage) of how intensively a resource is used. For example, a resource may take frequent breaks or you may assign maintenance tasks to the resource. This indicates that a percentage of the resource time is not available for the task. The actual usage is the ratio of the resource hours as specified in routing to the product of efficiency and utilization. For example, a routing has a resource requirement for 2 hours. The efficiency and utilization of the resource is expected to be 90% and 75%, respectively. Therefore, the actual resource usage is calculated as 2.96 hours.

\[
\text{Actual Resource usage} = \frac{(1 \text{ each multiplied by 2 hours per resource})}{(90\% \text{ multiplied by 75}\%)} = 2 \text{ hours divided by 0.675} = 2.96 \text{ hours}
\]

For a Make Order to manufacture 50 units, using the same routing as described in the previous example, you have:

\[
\text{Actual Resource usage} = \frac{(50 \text{ each multiplied by 2 hours per resource})}{(90\% \text{ multiplied by 75}\%)} = 100 \text{ hours divided by 0.675} = 148.15 \text{ hour}
\]

Considering the actual resource efficiency and utilization, the planning process generates a plan. If an additional resource usage is required to satisfy a demand, the planning process recommends inflating the resource usage.

Sourcing Allocation Splits: Explained

The planning process creates supplies based on the sourcing splits (rank one only). Supply planning uses split percentages that can be specified on sourcing rules. You can rank the sources of supply that are named in the rules and bills, giving one priority over another when the planning process generates recommendations. You can also assign sourcing percentages to these sources, which lets you to allocate a portion of the total orders to each source. Sourcing allocation considers all supply sources: buy, make, and transfer.
If there are no order modifiers, then when supplies are required on a day, the planned orders for the day are split into as many planned orders as required to meet the rank one sourcing allocation splits. If there are item-attribute or supplier-order modifiers, the supply is created for the highest allocation split percent source (rank one) respecting the order modifiers. Then a supply is created for the next source, again respecting the order modifiers. The supply sources are used in allocation percent order. As each order is created, the next lower allocation percentage source is considered. If all rank one sources are used, then an order is created for the remaining top allocation percent source again and so forth through the top rank sources. This is repeated until enough supply is created.

The calculation attempts to balance supply sources over the plan horizon to meet the rank one allocation percents. If supplies do not respect the split due to existing purchase orders or order modifiers, then the planning process select sources each day to bring the plan horizon supplies into alignment with the sourcing splits. You have to create supply on the source that leads to the lowest deviation of the cumulative sourcing split from the split percentages specified in the sourcing rule. The planning process does not consider historical receipts when calculating sourcing splits. Only open purchase orders, transfer orders, and make orders are considered.

The following formula is used to calculate the sourcing split each day:

If \( \text{Total Supply} \times \text{Source A allocation percentage} > \text{Supply for Source A} \), then create a new planned order for Source A (respecting order modifiers) so that \( \text{supply for Source A} > = \text{Source A allocation percentage} \times \text{Total Supply} \), until \( \text{Total Supply} > = \text{Total Demand} \).

Sourcing allocation and effective dates: If a sourcing rule becomes effective on a certain date, then the planning process respects the allocation percentages from the effective date and after. The planning process does not consider allocation that has happened before the effective date.

For example, a plan runs on March 1st and the sourcing rule is:

- Effective January 1st until May 31st: 40 % Acme, 60 % Business World
- Effective June 1st: 50 % Acme, 50 % Consolidated

Starting June 1st, the allocation process splits 50/50 between Acme and Consolidated. The allocation process ignores the history before the effective date. The allocation process does not consider whether Acme has 40% or 60% of the orders before June 1st.

Types of Reservations Managed in Supply Chain Planning: Explained

You can collect information about all reservations that are created by the inventory processes and view them in one of the Supply Chain Planning work areas. You can view the amount of supply that is pegged to order fulfillment lines.

Supply Chain Planning does not create reservations; it just displays all the reservations that are created by the inventory processes. You cannot edit the quantity or kind of supply that is reserved to a sales order in the configurable planners’ workbench.

The following types of supply can be reserved to a sales order in the inventory:

- On hand inventory
- Work orders
- Purchase orders
- Transfer orders

Multiple sources and quantities of supply can be reserved to a single sales order fulfillment line.
There are two ways by which sales orders are pegged to supplies:

- **Multiple sales orders can be pegged to a single source of supply:** In this case, the pegged quantity does not exceed the total supply quantity. This type of reservation is done when a single source of supply is adequate enough to fulfill many sales orders.

  For example, there are 50 sales orders for item A. Each sales order is for a single unit of A. You have defined one of your supply sources as an inter-organization transfer that supplies 100 units of A. Therefore, 50 units out of the 100 units from the transfer supply can be pegged to the different sales order fulfillment lines.

- **Multiple sources of supply can be pegged to a single sales order:** In this case, the pegged quantity does not exceed the total demand quantity. This type of reservation is done when a single supply source is not adequate to fulfill a sales order which demands a large quantity of supply for an item.

  If a sales order is recorded for an item that has a high demand, multiple sources of supply can be pegged in varied quantities to that single sales order. For example, you have defined two supply sources A and B as the following: A is an inter-organization transfer and B is a purchase from an external supplier. If a sales order of 800 units for this item is recorded, a part of the supply from A and a part of the supply from B will be reserved. Those reserved quantities are then pegged to the single order fulfillment line.

Supply planning respects a demand reservation to a lot without regard to the lot expiration dates. A lot that expires on day 6 can be reserved to a demand that is due on day 10. Supply Chain Planning collects this reservation as it is and reflects all reservations on the **Supplies and Demands** page. You can only view reservations in a Supply Chain Planning work area, but you cannot modify them.

### Viewing Pegging for Reservations: Procedure

You can view all the reservations that are created by the inventory processes, in one of the Supply Chain Planning work areas.

To view the sales order fulfillment lines that are pegged to different supplies and the amount of supply reserved against each sales order, follow these steps:

1. In the **Navigator**, click a Supply Chain Planning work area.
2. Click the **Plans** drawer.
3. Expand Plans, and select the plan of your choice.
4. Click the **Action** menu and select **Open**.
5. Select the Supply Analysis page layout.
6. Navigate to the **Supplies and Demands** window and search for all sales orders. You can search by defining one or more attributes in the search criteria, like Item, Organization, or Order Type.
7. In the Search Results area, click **View** and select **Columns**.
8. Drill down to the **Manage Columns** option.
9. Move the column names Reserved Quantity and Reservation Type from the **Hidden Columns** to **Visible Columns**.
10. Optionally, you can also use the **Move selected items to the top of list** button to move these two rows to the front. This helps you to view all information related to reservations at once.

**Tip:** You can also enhance your search by setting an **Advanced** search criteria such as Reserved Quantity > 0. This would display only those sales orders which have some amount of supply pegged to them.
Viewing Model Forecast and Sales Order Together: Explained

In the configure-to-order process, the execution system transacts the configured item using a unique item identifier that is different from the model item identifier. To make effective planning decisions, you need to view the model forecast, and the supply and demand orders together. You can view the model forecast and the sales order together in the Material Plan page.

By viewing the model forecast and sales order together, you can analyze and make effective supply and demand decisions in a configure-to-order environment.

Enabling the Measure for a Combined View of the Model Forecast and Sales Order

To view the model forecast and the sales order together, you must enable the Configured Item Sales Orders measure. Before you enable the measure, add the measure to the measure catalog. To view the measure, assign a category to the model.

Follow these steps to enable the measure:

1. From your Supply Chain Planning work area, open a plan, and click **Open > Full Pane**.
2. From the **Open Table, Graph, or Tile Set** page, search and open a **Material Plan**.
3. From the Material Plan page, click the **Selector Tool View Table Configuration** icon from the material plan tool bar.
4. In the Measures tab, move the **Configured Item Sales Orders** measure from the Available Measures column to the Selected Measures column.
5. Click **Save and Close**.

Modeling a Supply Chain

Phantoms: How They are Used in Planning

A phantom assembly, also known as phantom bill, is a nonstocked assembly that lets you group materials required to produce a subassembly. When you create a bill of material for a parent item, you can specify a component as a phantom. One bill of material can represent a phantom subassembly for one parent item, and a stocked subassembly for another parent item. A phantom bill of material allows you to manufacture and stock the assembly when necessary. For example, you can use phantoms to build and stock occasional spares for field service requirements. The planning process explodes through a phantom subassembly to the components.

Settings That Affect Phantom Assembly

The planning process ignores phantom assembly routing when you define a job or repetitive schedule. To avoid any additional lead time offset for components, you set the lead time of the phantom to zero.

How Phantoms Are Used in Planning

When model bills or option class bills are components to another bill of material, the component supply type is a phantom. Instead of passing the parent’s planned orders to the phantom, netting the phantom, and passing requirements to the phantom’s components, the planning process blows through the phantom to create component planned orders. For the organization parameter, you have only the Material Only option for Phantom Operation Sequence Inheritance. The planning process ignores order modifiers for items that have a phantom supply type. The planning process plans the phantom subassembly using the lot-for-lot lot-sizing technique.
Typically, phantom assemblies act as normal assemblies when they represent a top-level assembly, such as when you master schedule them or manufacture them using a discrete job. As a subassembly, however, they lose their identity as distinct assemblies and are a collection of their components. The components of the phantom subassembly are included on the job and in the planned supplies, but not the phantom itself. Using the bill of material to determine phantoms, has two advantages: it allows for more flexibility (because a component can be a phantom in one bill and not another), and treatment of phantoms in the planning process is consistent with Oracle WIP.

FIFO Pegging: Explained

Pegging is a process that the planning calculations use to link the supply with the demand, and the demand with the supply. FIFO is first in, first out. In FIFO pegging, demands are linked to supplies on a day-by-day basis. The planning processes sort demands by day, demand type, and supply quantity in ascending order. The planning processes sort supplies by day, supply type, and supply quantity in ascending order.

For all reserved demands and supplies, the planning processes first pegs demands with reservations (existing or recommended) to the reserved supply without regard to the demand type, the supply type, and dates. Pegging always respects reservations. For unreserved demands and supplies, the planning processes sort demands day by day in the following sort order:

- Past due sales orders
- All sales orders
- Manual demands

For all other demands, including forecasts and dependents demands, the planning processes sort supplies day by day in the following sort order:

- On hand
- Past-due supplies (firm by definition)
- Existing firm supplies
- Existing non-firm supplies
- Planned orders

During demand and supply netting in planning calculations, if safety stock levels are specified for an item organization, then the netting is performed considering the daily safety stock level. The planning calculations do not use the notion of safety stock demand. As there is no concept of safety stock demand, there is no pegging of a supply to a safety stock demand. The planning calculations do not peg some or all of a supply to anything when some or all of the supply is used to meet the required safety stock level. A supply, which meets a safety stock level, pegs to either future demand or is not pegged. Excess supplies because of order modifiers can peg to nothing at the end of the planning horizons.

Shrinkage: Explained

The planned quantities of products sometimes decrease or shrink as they move through the production process. Shrinkage rate is an item-organization attribute, which determines the expected scrap and other losses in inventory.

To overcome the inventory shrinkage, the planning process begins with production quantities greater than the required quantity to meet the demand. The planning process considers the value that you specify for shrinkage and uses it to plan for shrinkage of an item in an organization. The planning process plans for demand by starting with a quantity that considers shrinkage and then arrive at the required order quantity. The order quantity is the quantity after the shrinkage is applied.
planning process uses the shrinkage rate and the required order quantity to determine the start quantity. The planned order needs the start quantity to account for the shrinkage.

For example, consider an item that has a shrinkage of 10%. For a demand of 100, the planning process starts with a quantity that will shrink by 10% to arrive at 100.

The planning process derives the start quantity based on the following equation:

\[
\text{Start Quantity} = \frac{\text{Order Quantity}}{(1 - \text{Shrinkage})} \times 100
\]

\[
(100 / (100-10)) \times 100 = 111.11
\]

The supply planning process considers shrinkage for both planned orders and existing supplies. As work orders can be incomplete at the time of planning, you can track the status of the work order from your Supply Chain Planning work area.

**Firming Supplies**

When you firm a supply order, you can select either the start quantity or the order quantity as the firm quantity on the Supplies and Demands page. You can update either the Firm Quantity or the Firm Start Quantity column to a different value.

When you firm a planned order, the planning process updates the Firm Quantity column with the value in the Order Quantity column. You can also edit the Firm Quantity column based on your planning needs. Alternatively, you can specify the Firm Start Quantity column on a firm planned order. When you enter a value in the Firm Start Quantity column, the planning process clears the value from the Firm Quantity column.

When you rerun the plan in a simulation mode, you can see the following data:

- For the Planned Order with Firm Start Quantity specified, the Start Quantity column displays the Firm Start Quantity value. The Order Quantity column displays a value based on the following calculations:
  
  \[
  \text{Order Quantity} = \text{Firm Start Quantity} \times (1 - \text{Shrinkage}) = \text{Firm Start Quantity multiplied by (1 - Shrinkage)}
  \]

- For the Planned Order with Firm Quantity specified, the Order Quantity column displays the Firm Quantity value. The Start Quantity column displays a value based on the following calculation:
  
  \[
  \text{Start Quantity} = \frac{\text{Firm Quantity}}{(1 - \text{Shrinkage})} = \text{Firm Quantity divided by (1 minus Shrinkage)}
  \]

**Calculating Shrinkage for Work Orders**

A work order can be fully complete or partially complete during collections. When you collect a work order, the collected quantity represents the start quantity. The planning process populates these three columns only for work orders. The planning process calculates the new order quantity based on the current state of completion and the expected scrap. You can review the following parameters on the Supply Planning, Planning Central, and Demand and Supply Planning work areas to track the status of the work order:

- Start Quantity
- Completed Quantity
- Scrapped Quantity
- Remaining Quantity
- Expected Scrap Quantity
- Order Quantity

During collections, the planning process collects the start quantity from the execution systems. When you release a planned order, the planning process releases the releases the start quantity back to the execution systems.
Measures Enabled to Display Start Quantity

To view the start quantity and the start dates, the planning process uses the following three measures:

- Supply Start Quantity
- Reserved Supply on Start Date
- Reserved Supply Value on Start Date

Analyzing a Supply Plan

Scheduling Purchase Orders: Explained

Purchase orders, also known as buy orders, enable you to accurately measure the transit time from the supplier to the organization. The following fields are included on the purchase order schedule:

- Requested Ship Date
- Promised Ship Date
- Requested Delivery Date
- Promised Delivery Date
- Buyer-managed Transportation Indicator
- Shipping Method

Buyer-managed Transportation specifies that the buying company is responsible for arranging the transportation, from picking up the requested goods to delivering to ship-to locations specified in the order. When the Buyer-managed Transportation indicator is not selected, delivery dates are populated on the purchase order and ship dates are not populated on the purchase order. When it is selected, the ship dates are populated on the purchase order and delivery dates may be populated on the purchase order.

When Buyer-managed Transportation is selected, the buyer communicates a requested ship date on Purchase Orders and the supplier provides a promised ship date in response. When not selected, delivery dates are communicated between buyer and supplier. In both cases, the purchase order also contains shipping method at the line level. Transit times can be defined between a supplier site and organization location for shipping methods. The planning process can consider transit times for purchase orders.

When the planning process creates planned purchase orders, the planning process uses the shipping method from the sourcing rule to calculate the transit time. The total lead time from planned purchase order start date to dock date includes both processing lead time and transit lead time.

When you release a planned purchase order from a Supply Chain Planning work area, the following information is sent to purchasing:

- Shipping method
- Requested ship date and requested delivery date. If Buyer-managed Purchasing is selected, then both ship and delivery dates are populated on the purchase order. If Buyer-managed Purchasing is not selected, then only the delivery dates are populated on the purchase order.

Purchase orders are scheduled backward from the order due date. Scheduling purchase order respects all valid shipping, receiving, transit, manufacturing, and supplier capacity calendars. In supply chain planning, if any dates are in the past,
then the dates are set to the plan start date. The planning process issues reschedule recommendations for the following conditions:

- When the purchase order **Buyer-managed Transportation** indicator is selected and the old ship date is different from the new ship date calculated by planning.
- When the purchase order **Buyer-managed Transportation** indicator is not selected and the old delivery date is different from the new dock date calculated by planning.

**Example of Backward Scheduling Calculations**

Consider that the suggested due date is Day 10, where postprocessing = 1 day, transit time = 2 days, processing = 4 days, and preprocessing = 2 days. The following calculations are used for backward scheduling:

- Suggested Due Date = Day 10
- Suggested Dock Date = Day 9 (Dock Date = Due Date minus Postprocessing Lead Time)
- Suggested Ship Date = Day 7 (Ship date = Dock Date minus Transit Lead Time)
- Suggested Start Date = Day 3 (Start Date = Ship Date minus Processing Lead Time)
- Suggested Order Date = Day 1 (Start Date = Preprocessing Lead Time)

**Backward Scheduling and Order Dates: How It Is Calculated**

Backward scheduling is the process by which lead time is applied to supply orders. When the planning mode is unconstrained, backward scheduling is performed by the planning process.

When you run a supply plan, the planning process reports constraint violations as capacity overloads and lead time exceptions so that you are alerted to supply problems. The supply for your sales order becomes due on the end demand date.

**Settings That Affect Backward Scheduling and Order Dates**

When supply is just in time for a demand, the supply completion date is the demand date. The supply is then scheduled backward to arrive at the start dates for each operation that must be completed and due dates for supply of lower-level components that make up the final supply.

During backward scheduling of dates, if the plan start date is crossed, then all earlier dates are bucketed to the plan start date. This is referred to as compression.

Backward scheduling affects order due dates in the following ways for different types of items:

- For make items, compression begins at preprocessing lead time. The first operation and each successive operation are then compressed to zero duration until there is sufficient lead time for the remaining operations to complete using the resource duration.
- For transfer and buy items, the preprocessing lead time is compressed first. The processing lead time is then compressed and if insufficient lead time remains, post processing lead time is compressed.

**Note:** The processing time for a buy item is independent of item quantity.

You can set organization and customer receiving and shipping schedules and carrier transit schedules in the Manage Transportation Schedules section in Logistics. The only valid dates that planning calculations use for backward scheduling,
are the working days on the manufacturing and shipping calendars. Calendar defaulting rules are used by planning to
determine order dates calculations. The defaulting rules are:

- **Valid Supplier Capacity Calendar**: Either the Supplier or Supplier Site Capacity Calendar is used or a fully open
calendar of 7 days, 24 hours.
- **Valid Supplier Shipping Calendar**: The Carrier, or Supplier, or Supplier Site Calendar, the Supplier, or Supplier Site
Shipping Calendar, the Carrier, or Supplier Calendar, the Supplier Shipping Calendar, or a fully open calendar of 7
days, 24 hours is used.
- **Valid Organization Receiving Calendar**: Either the Carrier or Organization Calendar is used, or the Organization
Receiving Calendar, or the Organization Manufacturing Calendar.

**Note**: The defaulting rules are also applied to determine different calendars, such as Valid Organization
Manufacturing Calendar, Valid Organization Shipping Calendar, Valid Customer Shipping Calendar, and Valid
Transit Calendar.

### How Backward Scheduling Is Calculated

Backward scheduling is calculated based on the following:

- **Planned Make Order**: If your order is for a make item, the component due date is the start date for the operation that
requires it and supply is scheduled backward. The work definition provides the information about the component
and resource requirements for such an order. The new order due date becomes the date of the end demand.

**Note**: A make planned order exists only as a planned order in supply chain planning, and is not part of
manufacturing yet.

- **Work Order**: If your order is for an item which already exists as a work order, the component and resource
requirements are collected from the work order itself. The planning process can shift the work order to a new set of
dates without making alterations to the relationship of dates in the work order. The component due dates for that
end item are collected from manufacturing.

For example, take the following scenario:

- A is an end item with two components B and C that have different start dates.
- C is a make item with two components D and E that also have different start dates.

Components D and E are in the lower level of the work definition for item C and they are needed for the assembly of the make
planned order C. Similarly, components B and C are in the lower level of the work definition for item A and they are needed
for the assembly of the work order A.
The following figure illustrates the relationship between components A, B, C, D, and E that are used to make an end item.

**Relationship Between Different Components**

The planned make order rescheduled dates are determined by total quantity of demands and order modifiers. Total make order lead time (days) = fixed lead time + quantity multiplied by variable lead time.

The work order rescheduled dates are determined by component requirement start dates and end dates. If the end date is moved by 3 days, the start date is also moved by 3 days.

**Planning for Rework and Transform Work Orders: Explained**

Rework and Transform work orders are collected during the data collections process and they are shown as Nonstandard work orders in Planning Central, Supply Planning, and Demand and Supply Planning work areas.

You create Rework work orders in Oracle Manufacturing Cloud to perform rework activities on items that have issues or defects. The objective of rework is to make those items usable to satisfy customer demand.

You create Transform work orders in Oracle Manufacturing Cloud to enhance or upgrade existing items by adding or removing selective components from existing items. The objective of Transform work orders is to transform the existing item into a new item.

Sometimes, the rework and transform activities result in the removal of components from the item being reworked or transformed. You can use the removed components to satisfy future demands. Data collection collects the removed components and you can search the removed components when you select the order type as Nonstandard work order by-product on the Supplies and Demands page. The data collection process filters out all work order demands for an item, when the item itself is manufactured by the Rework work order.

The planning process considers all Nonstandard work orders as firm order. The Nonstandard work order does not influence the calculation of natural time fences for the item.
Plan Recommendations: Explained

Supply chain planning can generate plan recommendations. These are suggestions to take actions that can create a balance between supply and demand. You can view these suggestions in the Recommendations exception group.

The planning process can release two primary kinds of plan recommendations. They are as follows:

- It can suggest new planned orders: The planning process suggests that you order some new supply to meet the demand for a certain product. All of these supply suggestions are released by planning to Oracle Fusion Supply Chain Orchestration in the form of new planned orders. This new supply can be in the form of a manufacturing job in which case the planned order is released to manufacturing. If the new supply suggestion is a purchase requisition, Supply Chain Orchestration releases the planned order to purchasing. If the new supply suggestion is a transfer, Supply Chain Orchestration releases the planned order to logistics.

- It can suggest rescheduling or cancellation of existing supplies: The planning process suggests that you reschedule or cancel a current supply because the total supply for a product might be in excess compared to the demand for it. You can cancel current planned orders that exist as discrete jobs or as purchase orders or transfer orders. Similarly, planning can also suggest that you reschedule some of the existing supply to meet demand in future. The rescheduling is done for supplies that exist as discrete manufacturing jobs, purchase orders or transfer orders.

If the planning process suggests new supply, and the planner releases the planned order, the released planned order is sent to Oracle Fusion Supply Chain Orchestration. The planned order has the following details specified in it:

- Item
- Organization
- Start date, dock date and if applicable, ship date
- Source
  - If it is a make item, the organization remains the same.
  - If it is a transfer item, the source organization must be specified.
  - If it is a buy item, the supplier and supplier site must be specified.

You can open the Supplies and Demands window from the Supply Analysis page layout to view individual planned orders. You can also open the material plan to view the aggregate total supply for your plan.

You cannot view rescheduled plan recommendations in the material plan. The material plan accepts the recommendations from supply chain planning and uses the rescheduled dates when aggregating supply. The planning calculations assume that the rescheduled recommendations are already incorporated within the aggregate supply calculations and use the rescheduled dates.

Releasing Plan Recommendations: Explained

One of the key execution capabilities that supply chain planning offers is that you can release plan recommendations to implement standard plan-to-produce business flows. You can release plan recommendations either from a supply plan, or from a demand and supply plan.

You can either manually review and release each supply chain planning recommendation or automatically approve and release them.
The following table illustrates the plan recommendations that either the planning processes can release automatically for different order types, or you can manually release the orders:

<table>
<thead>
<tr>
<th>Order Type</th>
<th>Updates Suggested by Planning Calculations</th>
<th>Actions You Can Take</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase Orders</td>
<td>Quantity, Delivery Date, Firm Status</td>
<td>Reschedule, Cancel</td>
</tr>
<tr>
<td>Purchase Requisitions</td>
<td>Cancellation</td>
<td>Cancel</td>
</tr>
<tr>
<td>Work Orders</td>
<td>Start Date, Completion Date, Firm Status</td>
<td>Reschedule, Cancel</td>
</tr>
<tr>
<td>Transfer Orders</td>
<td>Start Date, Arrival Date, Shipping Method</td>
<td>Reschedule, Cancel</td>
</tr>
<tr>
<td>Sales Orders</td>
<td>Scheduled Arrival Date, Scheduled Ship Date, Shipping Method</td>
<td>Reschedule</td>
</tr>
</tbody>
</table>

Note: In all cases, cancellation entails releasing an order quantity of zero.

In case of purchase orders and transfer orders, you can manually change the input values for the updates suggested by the plan recommendations. You can do this in the planners' workbench.

The following recommendations are released by supply chain planning to Oracle Fusion Supply Chain Orchestration:

- New planned orders for make, buy and transfer of supplies
- Reschedules of existing make, buy, and transfer supplies

Oracle Fusion Supply Chain Orchestration processes these recommendations and sends both new releases and reschedules to manufacturing, purchasing, and logistics depending on the type of supply.

The following recommendations are released by supply chain planning to Oracle Fusion Order Management:

- Reschedules of sales orders
- New planned orders for drop shipments

Manually Releasing Plan Recommendations: Procedure

You can manually review the plan recommendations that are generated by the planning process and then release them for execution. You can either release new planned orders as supply, or reschedule the supplies existing in the form of work orders, transfer orders and purchase orders.

To review and release plan recommendations, perform the following steps:

1. In the configurable planners’ workbench, select the Supply Analysis page layout.
2. Navigate to the Supplies and Demands window and search for your orders.
3. Select one or multiple rows which show planned orders that you want to release for execution.
4. Click Actions and drill down to Mark for Release.

Note: Verify that the Release Status field is updated to Marked for Release for all the selected rows.
5. Save your changes.

6. Navigate back to the Supply Analysis page and click Actions. Select the Release option. This initiates the Release Plan process. A dialog box displays the status of the process.

7. You can also verify the status of this process by navigating to the Scheduled Processes page. Follow these steps to verify release results on the Scheduled Process page:

   a. Use the Hierarchy view. The top-level process name is Release Plan.
   b. Drill down to Release Planning Recommendations and select Load Interface Tables.
   c. Check the log file of each table to confirm the release. Also, check the submission notes for each process. The notes identify the type of release.

After you release the plan recommendations, all new, rescheduled, or canceled planned orders are sent to Oracle Supply Chain Orchestration Cloud. Navigate to the Supply Chain Orchestration work area to view requests that were not processed and check why these exceptions were created.

Releasing Plan Recommendations to an External Execution System: Procedure

You can release plan recommendations or planned orders from Oracle SCM Cloud applications to an external execution system. When you release a planned order, the planning process generates a CSV file for the planned order. The planning process attaches the generated CSV file to the scheduled processes called Release Planning Recommendations: Release to External Source Systems. You can download the CSV file from the scheduled processes. The planning process also saves the CSV file in a Zip file format in the Universal Content Manager. The name of the Zip file is ReleasetoExternal.zip.

Prerequisite

Before you can release planned orders from Oracle SCM Cloud applications to an external execution system, you must do the following:

1. Assign your organization as an external source system.
2. Run collections from the external source system.

After you successfully run collections, you can plan your orders and release them to the external source system. The release process is same for an Oracle Fusion source system and an external source system.

Release Planned Orders

Follow these steps to release the planned orders:

1. From your Supply Chain Planning work area, click the Tasks panel.
2. Click Manage Plans and then search your plan.
3. Open the plan, and then click Actions > Release.

The planning process exports the plan in a CSV format and attaches the CSV file to the scheduled processes. Also, the planning process save the CSV file in a Zip file format in the Universal Content Manager. You can download the Zip file from the File Import and Export link in the Navigator.

For more information, see Releasing Plan Recommendations to External Systems (Doc ID 2305394.1) on My Oracle Support at https://support.oracle.com.
Publishing Order Forecast: Explained

You publish order forecast for your suppliers. The suppliers can view the forecast and send their commits to you as a supplier capacity. You do not have to save the plan to the database before publishing the order forecast.

You can publish order forecast from the following pages in the Supply Planning, Demand and Supply Planning, or Planning Central work area:

- Items
- Supplies and Demands
- Manage Plans or individual plan

When you select Publish Order Forecast from the Actions menu, the planning process submits a job in Scheduled Processes. The planning process deselects all additional parameters that are available in the Publish Order Forecast job and submits the job. If you want to select various additional parameters that are available for the Publish Order Forecast scheduled process, you must submit the job manually from the Scheduled Processes work area and select your parameters.

Points to Remember

Consider the following points before you publish the order forecast:

- When you publish the order forecast from the Manage Plans page, you publish the order forecast for all the valid suppliers within the plan.
- When you are on the Items page or the Supplies and Demand page, you can publish order forecast that belongs to one Item-Organization at a time. You cannot publish two rows of items with different Item-Organization combinations.
- The Publish Order Forecast job also launches the Supply Planning Collaboration Decomposition job. You do not have to run the decomposition job separately.

Publishing Supply Order Details: Explained

One of the important aspects of collaborating with suppliers is to provide them an insight into the open supply orders. Collaborating with suppliers on open supply orders enables you and your suppliers to plan supply chain activities more efficiently. Supply orders are of four types: purchase order, purchase requisition, shipment in receiving, and in-transit shipment.

You can publish supply orders along with planned orders to Oracle Supply Chain Collaboration Cloud using the Publish Order Forecast scheduled process. Use the Navigator to access the Scheduled Processes page where you can select the Publish Order Forecast scheduled process. In the Process Details dialog box for the Publish Order Forecast scheduled process, you can select the following check boxes:

- **Include purchase orders in order forecast**: Includes purchase orders within the order forecast. All the open purchase orders for an item on a day are added to the planned orders on that day and published as order forecast at the supplier or supplier site level.
- **Include requisitions in order forecast**: Includes purchase requisitions within the order forecast. All the open purchase requisitions for an item on a day are added to the planned orders on that day and published as order forecast at the supplier or supplier site level.
- **Run the Supply Planning Collaboration Decomposition job**: Runs the Supply Planning Collaboration Decomposition scheduled process along with the Publish Order Forecast scheduled process.
• **Publish order details**: Publishes all four types of supply orders along with the planned orders.

**Material Plan View in Supply Chain Planning: Explained**

The Material Plan is a predefined table in Supply Chain Planning. The Material Plan table is a time-phased view of the demands, supplies, and daily balances across the plan horizon for any item and organization combination. The item, organization, and measures are displayed for the row headings, while the time periods are displayed for the column headings. Access the Material Plan table from the Planning Central or Supply Planning work area.

⚠️ **Caution**: If you open the predefined Material Plan table without using any filters, it can take a long time to display the results. Oracle recommends that you create a copy of the Material Plan and add filters to reduce the item count and horizon of the material plan.

You can edit the measures at aggregate levels and allocate the measures to lower levels. For example, you can edit the manual demand measure by organization, item, and period, and then allocate that measure down to the day.

You can edit a measure’s value inline by clicking in a cell and changing the value. Or, you can use mass editing capabilities that are available to adjust several cells at the same time. For example, you can increase the forecast of item X for the next three months by 30 percent.

You can also display the material plan as a graph. Each measure is plotted along the x-axis, which is the time dimension.

From the Material Plan table, you can drill down to the following tables:

- Item Exceptions
- Items
- Supplies and Demands
- Supply Chain Bill

Although you cannot modify the layout of the material plan, you can copy the material plan and configure the new layout in the following ways:

- Add or remove members and measures
- Filter members, such as items or categories
- Add conditional formatting, such as font, background color, and status icons
- Add user-defined drill-to actions

**Manage Demand Fulfillment**

**Managing Demand Fulfillment: Explained**

To improve the demand fulfillment of your plan, use the Demand Fulfillment page to review the at-risk demands in your plan and their related recommendations. You can take actions to accept recommendations from this page.

Using the Demand at Risk Summary and the Demand Fulfillment page, you can do the following:

- View prioritized at-risk demands based on order values weighted by the number of associated recommendations.
- Take actions to accept or mark recommendations as complete.
• Review summary information provided for the current demand fulfillment position of your plan to analyze the potential for improvement based on selected at-risk demands. The information also provides an understanding of the expected demand fulfillment position based on accepted and completed recommendations.

To review and improve your demand fulfillment:

1. Navigate to a Supply Chain Planning work area and select the Manage Plans task.
2. On the Manage Plans page, perform a search, and then open your plan.
3. In the Page Layout list, select the Plan Summary.
4. Note that the tiles in the Plan Summary layout include a Demand at Risk tile.
5. On the Demand at Risk in thousands tile, click the Select Tile bar to review the Demand at Risk Summary data.
6. To review the demand at risk data:
   a. Using the treemap: Click an area in the treemap. Typically, you want to start with the area that has the highest demand at risk value. From the Drill To actions, click Demand Fulfillment.
   b. Using the table: Click the Show Table icon. In the Demand at Risk Summary page, click a cell. Typically, you want to start with the cell that has the highest demand at risk value. From the Drill To actions, click Demand Fulfillment.
7. The Demand Fulfillment page shows the individual orders that are at-risk and their related recommendations.

Tip: You can open the Demand Fulfillment page directly without having to drill from the Plan Summary. Once a plan is open, the select the open action from the page level actions and search for the Demand Fulfillment page. From the Demand Fulfillment page, you can search for at-risk demands using the filter fields in the search panel.

Review the At-Risk Demand section and the Recommendations section, and then take further actions.

Filtering Demand Fulfillment Recommendation Summary: Explained

The recommendation summary information available in the Demand Fulfillment page can assist you in selecting at-risk demand to work on. You have a summary graph, a summary table, and a cumulative at-risk demand value slider for filtering the information to analyze the recommendations.

Recommendation Summary Graph

The recommendation summary graph shows the cumulative at-risk demand value and the related number of recommendations associated with that value. To maximize effort, you should aim for a low number of recommendations with the associated at-risk demand value substantial enough to make a difference in demand fulfillment percentage. You use the slider to filter by top n, the cumulative demand value.

For example, move the slider to the marker most closely matching $500,000 and click Go or arrow button to the right of the slider. After moving the slider to the left, the graph shows the at-risk demands that make up the top n of at-risk demand value.

Recommendation Summary Table

In addition to the recommendation summary graph, demand fulfillment also provides a summary table that shows you information about demand fulfillment position.
## Demand Fulfillment Recommendations: Critical Choices

You take actions on the demand fulfillment recommendations by accepting recommendations. Five types of recommendations are associated with an at-risk demand. They are displayed in tabs under the Recommendations section on the Demand Fulfillment page.

Following are the recommendation tabs:

- Expedite Buy Orders
- Expedite Make Orders
- Expedite Transfer Orders
- Add Resource Availability
- Add Supplier Capacity

You can choose to view all recommendations associated with all at-risk demands, or choose to view the recommendations associated with the demands that you have selected.

### Expedite Recommendations

You can review and accept three types of expedite recommendations:

- Expedite buy orders: This includes purchase orders, requisitions, and planned buy orders.
- Expedite make orders: This includes work orders and planned make orders.
- Expedite transfer orders: This includes transfer orders and planned transfer orders.

Expedite recommendations show when the supply is needed (expedite date) and how many days earlier (expedite days) the supply is required than currently planned.

Regardless of the type of expedite recommendation, many columns of an expedite recommendation are the same. For example, organization, item, order, expedite date, and expedite days are common to all expedite recommendations. However, some columns are specific to certain types of expedite recommendations. For example, processing lead time is specific to the make order recommendation tab.

When you accept an expedite recommendation, the order is firmed using the expedite date as the firm date. When the plan is run after accepting the recommendation, the planning process assumes the supply is available on the firm date.
Add Resource Availability Recommendation

The add resource availability and add supplier capacity recommendations are handled in similar ways. The add resource availability recommendation indicates how many hours a resource is overloaded. To resolve an add resource availability recommendation, you must increase the available hours through Oracle Fusion Manufacturing applications and then recollect the data.

If you have increased the available hours, but have not run collections yet, you can mark the recommendation as complete to indicate that you have taken action against the recommendation.

Add Supplier Capacity Recommendation

The add supplier capacity recommendation indicates how many additional units of capacity are required. To resolve an add supplier capacity recommendation, you must increase the supplier capacity. Use the CSV file method to upload an increased supplier capacity for the item.

If you have increased the capacity, but have not run collections yet, you can mark the recommendation as complete to indicate that you have taken action against the recommendation.
9 Manage Supply Network Model

Maintaining Supply Network Model: Explained

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

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

Review the Collected Data

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

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

Use the Customer, Supplier, and Carrier tabs to review the collected data for suppliers, supplier sites, and carriers.

Buy and Sell Transfers

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

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

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

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

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

Related Topics

- Collecting Planning Data: Explained
• Collecting Reference, Supply, and Demand Data from Oracle Fusion Source System: Explained
• Loading Planning Data from Files: Overview

Publishing Order Forecast to Suppliers Based on Start Date and Dock Date: Explained

You publish order forecast to your suppliers to enable them to commit supply and indicate their ability to meet the demand. Collaborating with suppliers by publishing order forecast enables:

• Suppliers to send supply commits to the Original Equipment Manufacturer (OEM)
• OEMs to receive supply commits as supplier capacity

Collaboration enables suppliers to get an insight into the demand that the OEMs forecast and plan supply chain activities to meet the demand. Additionally, collaboration with suppliers enables OEMs to plan their downstream activities in the supply chain more efficiently.

Use the Collaboration Basis column in the Suppliers tab on the Maintain Supply Network Model page to indicate the basis on which you want to publish the order forecast to your suppliers. You can choose to publish the order forecast at the supplier and supplier site levels based on one of the following dates:

• **Start date**: Suppliers use the start date to know when they need to start manufacturing an order to fulfill the order on time
• **Dock date**: Suppliers use the dock date to know the date by which they need to fulfill the order

Approved Supplier List: Explained

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

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

Define the following item-to-supplier relationships and order modifiers in Oracle Fusion Procurement:

• Supplier
• Supplier site
• Minimum order quantity
• Fixed lot multiple

To upload additional attributes for supply planning to use, you must create and collect the ASL from purchasing. You can then use the CSV file upload to define additional attributes such as the following:

• Item-supplier lead time
• Supplier capacity calendar
• Daily supplier capacity

**Related Topics**

• Supplier Capacity Parameters: Critical Choices

**Associating Calendars with Supplier Sites: Explained**

Use a supplier site calendar to measure processing lead times for purchases from a supplier site. You can associate a Supply Chain Planning calendar with a supplier site to use for all items sourced from that supplier site. The calendar is in the collected planning data.

You can associate a calendar with supplier sites to use if there is no calendar defined through the Approved Supplier List upload for a supplier site-item combination. From a Supply Chain Planning work area, navigate to the Maintain Supply Network Model page, Suppliers tab. In the Supplier Site Calendar column for a supplier, select a calendar name from the list of collected calendars. You can only edit this field if the supplier row contains a supplier site.

When you run the plan, the planning process uses the selected calendar on the Maintain Supply Network Mode page if the approved supplier list calendar for the supplier site-item is blank. If the approved supplier list calendar for the supplier site-item is blank, and you do not associate a calendar with a supplier site on the Maintain Supply Network Model page, then the planning process uses the 24/7 calendar.

**Assignment Sets, Sourcing Rules, and Bills of Distribution: Explained**

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

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

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

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

• Sourcing rules
• Bills of distribution
• Assignment sets
Sourcing Rules

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

The three types of sources are:

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

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

Bill of Distribution

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

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

Assignment Sets

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

Sourcing Assignment Hierarchy

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

The following table lists the supply sourcing hierarchy.

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

⚠️ **Caution:** To use category in the assignment set, you must set the profile option catalog for sourcing assignments to select the catalog that is used for sourcing. Typically, the planning catalog is used. However, any collected catalog can be selected in the profile option. If the profile option is blank, then category is not available in the assignment hierarchy.

When you source supplies for sales orders and forecasts (independent demands), order promising and planning use the more detailed hierarchy. This hierarchy includes demand class, customer, and customer site which are dimensions of independent demand.

The following table lists the demand sourcing hierarchy.

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

Using the demand sourcing hierarchy, if a demand line includes a value for demand class, then if no sourcing rule exists for Item - Customer / customer site or Item - Customer, but a rule exists for Item-Demand Class, then that rule is used to determine supply sources for the demand line.

When using the sourcing hierarchy, if two rules conflict, the more granular rule is used. To verify which source is used for an assignment set, from within the set, click the **View Sourcing** button after entering the following required parameters:

- Assignment set
- Organization
- Item
- Date

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

### Specifying Catalogs for Assignment Sets: Explained

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

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

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

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

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

**Note:** Assignment sets are not applicable to the Demand Management work area.
Using Item Attributes for Supply Planning: Explained

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

To set item organization attributes for planning:

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

The following table lists the attributes related to planning.

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

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

### Order Modifiers

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

Order modifiers that you can use are:

- **Minimum Order Quantity**
- **Maximum Order Quantity**
- **Fixed Order Quantity**
- **Fixed Lot Multiplier**
- **Fixed Days Supply**
- **Rounding**

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

- **Fixed Days Supply**: One planned order for this item must cover all the shortages for the number of days specified in the value. For example, if the net requirements are 50 on Monday, 100 on Wednesday, 70 on Thursday, and you have set fixed days supply to five, the planning process creates one planned order, with quantity of 220 (50 + 100 + 70) and due on Monday. The period start dates are not fixed. In the example, the next period of five days would not always start on the following Monday but would start on the next day after Friday that has net requirements. You can adjust the fixed days supply value using the other order modifiers. Therefore, the next period of five days could be the following Wednesday through the second Tuesday.
- **Fixed Order Quantity**: You must always set the planned order quantity with this value. For example, if the net requirements are one and you have set fixed order quantity to 200, the planning process creates one planned order with quantity of 200. If set, the planning process skips to the modifier Round order quantities.
- **Fixed Lot Multiplier**: You must always have the planned order quantity with this value. For example, if the net requirements are 400 and you have set fixed lot multiple to 150, the planning process creates one planned order with quantity of 450.
- **Minimum Order Quantity**: The planned order quantity may never be less than this value. For example, if the net requirements are 100 and you have set minimum order quantity to 150, the planning process creates one planned order with quantity of 150. If set, the planning process skips to the modifier Round order quantities.
• Maximum Order Quantity: One planned order for this item may not have a quantity more than this value. For example, if the net requirements are 200 and you have set maximum order quantity to 150, the planning process creates two planned orders, one with quantity of 150 and the other with quantity of 50.

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

Drop Shipment: Explained

Drop ship is an order fulfillment strategy where the seller does not keep products in inventory. Instead, the seller relies on suppliers or contract manufacturers to build, store, and ship orders to customers. Material flows directly from the supplier to the end customer. In this flow, the shipment is called a drop shipment.

The drop ship flow includes the following steps:

1. A customer places an order for a product.
2. The seller issues a purchase order for the item and provides instructions for shipping directly to the customer.
3. The suppliers or contract manufacturers ship the product.
4. The seller earns a profit.

Drop Ship Validation Organization: Explained

The planning processes use a special organization called drop ship organization for drop ship demands and supplies. Use the drop ship validation organization to get various item organization attributes, such as lead times and time fences for drop ship items. You must specify a drop ship validation organization for each source system that supports drop shipments. Specify the drop ship validation organization value on the Manage Organizations page in the Maintain Supply Network Model task.

Use the drop ship validation organization for the following purposes:

• As the source for organization-item attributes when creating drop ship planned orders
• As a proxy for the organization for drop ship forecasts and manual demands
• As a proxy for the organization during the collections of drop ship sales orders and drop ship history

Specify the drop ship validation organization when you generate a forecast or create a manual demand. Drop ship sales order bookings and shipments history are collected with the drop ship validation organization when items are shipped from the warehouse. Demand forecasting can create forecasts for the drop ship validation organization and release the forecasts for planning supplies.

The drop ship validation organization can be the item master for a source system, but it is not required.

✍ Note: The drop ship validation organization must be an item organization. When you set up the drop ship validation organization, if the item master holds any transactions, create a new drop ship validation organization.

To set up a drop ship validation organization:

1. Define an item organization in the Product Information Management work area.
2. Enable the new item organization for collection from the Oracle Fusion source system.
3. Run collections to collect organization entities.
4. Perform the following steps in a Supply Chain Planning work area to complete the drop ship sourcing setup:
   a. Navigate to a Supply Chain Planning work area.
   b. Click the Tasks panel tab.
   c. In the Tasks panel, click Maintain Supply Network Model.

   ☏ Note: You can enable only one organization for each source system as the drop ship validation organization.
   d. In the Organizations region, select the Drop Ship Validation Organization option.

   The drop ship validation organization setup is complete.

Setting Up a Drop Ship Plan: Explained

When you set up a plan for drop ship, you can include both drop ship sales order and standard sales orders (forecasts and supplies) from a direct ship organization in the same plan.

To set up your plan for drop ship:

1. From a Supply Chain Planning work area, open your plan.
2. From your plan, click Actions and select Edit Plan Options.
3. On the Edit Plan Options page, click the Supply tab and then click Select Advanced Options.
4. On the Supply: Advanced Options page, select Include drop ship demands and supplies.
5. Optionally, you can include other direct ship organizations.
6. Set the other plan parameters, as required.

   For example, select Create time fence if you want time fences to apply to drop ship forecasts.
7. Save the plan.
8. Run the plan to include the drop shipments in the plan output.

   ☏ Note: In your drop ship plan, search for supplies and demand in the drop ship validation organization. You can note that the customer information is displayed on the purchase order and the supplier information is displayed on the sales order.

Setting Up Drop Ship Sourcing: Procedure

You can apply drop ship sourcing only to the independent demands.

To create drop ship sourcing:

1. Define a global sourcing rule and specify a buy from supplier, supplier site, and supplier source system.
2. In the assignment set, assign the global sourcing rule to an assignment level that includes an item or a category. Assign the global sourcing rule to a customer or a zone as required, but you cannot assign the rule to an organization.
You can apply drop ship sourcing only to the independent demands. The demand sourcing hierarchy is applied for drop ship cases. If a level 1 rule is found for an item and customer or customer site, then that rule is used. Otherwise, if the highest level rule is assigned to a category-customer level, then that rule is used.

The following table lists the ranking of various demand sourcing hierarchies:

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

If an assignment set contains drop ship rules that are already assigned to an item or a category, then you must define organization-specific rules for an item or category that is both drop shipped and also shipped to an inventory organization.

If the sourcing rule for the drop ship demand includes a transfer from source or a make at, the transfer from source and make at is ignored.

If there are multiple buy from sources, then the buy from sources are reapportioned to equal 100%.
Drop Shipment Forecast: Explained

You create a drop ship forecast based on the drop shipment shipping history or booking history. You can also create plans using drop ship forecasts to see the projected drop ship planned orders.

To enable the drop shipment history, the collections process sets the Ship-from organization value of drop ship shipments and bookings history to the drop ship validation organization.

Drop shipment history has an organization reference to the drop ship validation organization. Collecting and using the history facilitates creating a forecast for future drop ship shipments or bookings. The forecast uses the drop ship validation organization. You can use this forecast as a demand schedule for a supply plan that includes drop shipments.
10 Simulation Sets

Simulation Sets: Explained

A simulation set enables you to modify item-organization attributes for testing purposes. Use a simulation set to quickly change item-attribute values without having to recollect items. For example, you can test planning results by changing item lead times or order modifiers.

You can open a simulation set and use the Items table to modify the following item attributes.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead times</td>
<td>Fixed Lead Times, Variable Lead Times, Preprocessing Lead Time,</td>
</tr>
<tr>
<td></td>
<td>Processing Lead Time, Postprocessing Lead Time</td>
</tr>
<tr>
<td>Order modifiers</td>
<td>Minimum Order Quantity, Maximum Order Quantity, Fixed Lot Multiplier,</td>
</tr>
<tr>
<td></td>
<td>Fixed Order Quantity, Fixed Days of Supply</td>
</tr>
<tr>
<td>Time fences</td>
<td>Demand Time Fence Type, Planning Time Fence Type, Release Time Fence</td>
</tr>
<tr>
<td></td>
<td>Type, Demand Time Fence Days, Planning Time Fence Days, Release Time</td>
</tr>
<tr>
<td></td>
<td>Fence Days</td>
</tr>
<tr>
<td>Safety stock</td>
<td>Safety Stock Planning Method, Days of Cover, and several other</td>
</tr>
<tr>
<td></td>
<td>attributes used for safety stock level calculation</td>
</tr>
<tr>
<td>Other</td>
<td>Standard Cost, Acceptable Early Days, Excess Horizon, Obsolescence Date,</td>
</tr>
<tr>
<td></td>
<td>Selling Price, Discount Percentage, Back-to-Back Enabled</td>
</tr>
</tbody>
</table>

Creating a Simulation Set: Procedure

Perform the following steps to create a simulation set from the Plan Inputs work area:

1. In the Navigator, click the Plan Inputs work area link.
2. On the Plan Inputs page, click the Open button and select: Full Pane.
3. In the Open Table, Graph, or Tile Set dialog box, do the following:
   a. In the Search drop-down list, select: Name.
   b. In the Search text box, enter the name of a table, such as Items or Resources.
   c. Click the Search icon button.
   d. Select the Items table and click OK.
4. On the Plan Inputs page, Items tab (or Resources tab), click the Search button.
5. In the Search Results region, select one or more rows and do the following:
   a. Click Actions and then select Add to Simulation Set.
b. In the Add to Simulation Set dialog box, click the **Search: Simulation Set** down arrow for a list of values, and then click **Create Simulation Set**.

c. In the Create Simulation Set dialog box, in the **Simulation Set** field, enter the name of the simulation set you want to create.

d. Click **Save and Close**.

e. In the Add to Simulation Set dialog box, click **Save and Close**.

**Related Topics**

- Simulations in Supply Planning: Explained
- Copying Data to Simulation Sets in Supply Planning: Procedure
- Adding Data from Plan Inputs to Simulation Sets: Procedure

## Editing a Simulation Set: Procedure

Perform the following steps to edit a simulation set from the Plan Inputs work area:

1. In the Navigator, click the **Plan Inputs** work area link.
2. On the **Plan Inputs** page, click the **Plans** panel tab.
3. In the **Plans** panel drawer, do the following:
   a. Expand the list of Simulation Sets.
   b. Select a simulation set, right-click on it and select **Open**.
4. On the **Simulation Set** page, click **Open** and then select **Full Pane**.
5. In the Open Table, Graph, or Tile Set dialog box, select a table, such as **Resources** or **Items**, and click **OK**.
   
   On the Simulation Set page, a new tab opens for the table that you selected, such as the Resources tab or the Items tab.
6. In the Search region, click **Search**.
7. In the Search Results region, select one or more rows. Click **Actions** and then select **Edit** from the drop-down list.
8. In the edit dialog box, you can edit some of the attributes and drill down to additional tables, depending on the table that you accessed. For example:
   
   o For the Resources table, you can change the Bottleneck value. You can also drill down to the Resource Availability table.
   o For the Items table, you can change the Processing Lead Time value. You can also drill down to the Suppliers table.
9. When done, click **OK** to return to the **Simulation Set** page. Changed rows and fields are marked with small colored dots.
Simulating Demand and Supply Changes: Explained

Planning Central enables you to simulate the effects of demand and supply changes on a plan.

Item Simulation Sets

You can use item simulation sets to edit item-organization parameters within the Planning Central work area and then run a plan using the edited values. You can quickly simulate demand and supply changes, and analyze plan output with the changes.

After you open a plan, open the Supplies and Demands table to make the following changes:

- Add demands: Create a manual demand and firm the date and quantity.
- Cancel demands: Firm the demand and change the firm date.
- Reschedule demands: Firm the demand and change the firm date.
- Add new planned orders: Create a planned order and set the firm date and quantity.
- Cancel supplies and planned orders: Firm the supply and set the firm quantity to zero.
- Reschedule supplies: Firm the supply and change the firm date.

By running the plan with the **Do not refresh with current data** option selected, you can see the results of your demand and supply changes.
Glossary

dimension
A data category used to organize business data for retrieval and preservation of values. Dimensions usually contain hierarchies of related members grouped within them. A dimension categorizes and describes measure data. For example, a measure named Price might be categorized by Product and Time, so that the price of items can be tracked over time.

FIFO
Abbreviation for first in, first out. A material control technique of rotating inventory stock so that the earliest inventory units received or produced are the first units used or shipped. The ending inventory therefore consists of the most recently acquired goods.

item structure
The hierarchical structure of a configurator model that represents a model imported as a snapshot from Oracle Fusion Product Model.

measure
Contains data that is organized by the measure’s dimensions. For example, measures named Price and Forecast with the dimensions Product and Time would contain price data and forecast data for each product and time period.

planning data repository
The set of data collected from source systems and stored for use by order management, order promising, and supply chain planning processes.

sales order
A contractual document between a sales organization and a customer. You create a sales order in the Order Management work area. Order Management also transforms a source order it receives from a source system into a sales order that it can submit to order fulfillment.

Selector Tool
A user interface within supply chain planning work areas used to select measures, hierarchy levels, and dimension members. Used when creating and editing tables, graphs, analysis sets, and infotiles.

work area
A set of pages containing the tasks, searches, and other content you need to accomplish a business goal.