Oracle SCM Cloud
Implementing Supply Chain Planning

Release 13 (update 18C)
# Oracle SCM Cloud
## Implementing Supply Chain Planning

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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>
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<tr>
<th>Convention</th>
<th>Meaning</th>
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<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></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>
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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
Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

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.
Implementing Supply Chain Planning: Overview

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

The Supply Chain Planning offering includes the following task lists:

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

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

- Oracle Product Management Cloud
- Oracle Supply Chain Materials Management Cloud
- Oracle Order Management Cloud
- Oracle Purchasing Cloud
- Oracle Manufacturing Cloud

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

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

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

Defining Supply Chain Planning: Explained

The Define Supply Chain Planning Configuration task list is part of the Supply Chain Planning offering. If you have navigated to the Setup: Supply Chain Planning page from the Supply Chain Planning offering in the Setup and Maintenance work area, the Supply Chain Planning Configuration functional area corresponds to the Define Supply Chain Planning Configuration task list. The task list, or functional area, contains six tasks, two of which are required to set up Planning Central, Supply Planning, Demand Management, and Sales and Operations Planning work areas. This topic explains the following:

- The tasks included in the task list, or functional area, and which tasks are required.
The Tasks Included in the Task List

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

<table>
<thead>
<tr>
<th>Task</th>
<th>Required or Optional</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Trading Community Source Systems</td>
<td>Optional</td>
<td>The Oracle Fusion source system is predefined. You must create a trading community model if the source system version is External.</td>
</tr>
<tr>
<td>Manage Planning Source Systems</td>
<td>Optional</td>
<td>The Oracle Fusion source system is predefined. You must add a source system if you plan to perform supply chain planning for external source systems.</td>
</tr>
<tr>
<td>Manage Planning Profile Options</td>
<td>Optional</td>
<td>You can use the predefined values for all of the profile options.</td>
</tr>
<tr>
<td>Collect Planning Data</td>
<td>Required</td>
<td>Planning Central, Supply Planning, Demand Management, and Sales and Operations Planning work areas use data collected into the planning data repository. You must collect planning data to use any of these products.</td>
</tr>
<tr>
<td>Load Planning Data from Files</td>
<td>Optional</td>
<td>If you are not using the Oracle source system to collect data, you can load data from CSV files for usage by Supply Chain Planning work areas. For example, if you are using external data for Order Promising work area, you must load data from these external source systems.</td>
</tr>
</tbody>
</table>
| Configure Planning Analytics                 | Required             | A minimum set of steps must be completed for this task for plans to run successfully. Collect calendars from the Oracle Fusion source. Add the following to the default Dimension catalog:  
  • At least one calendar to the Time hierarchy. |
<table>
<thead>
<tr>
<th>Task</th>
<th>Required or Optional</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>• At least one product catalog to the Product Hierarchy, if the default Planning Catalog is not collected.</td>
<td></td>
<td>Default hierarchies can be used for the other dimensions.</td>
</tr>
</tbody>
</table>

Work Areas to Use to Access the Tasks

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

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

Managing Trading Community Source Systems for Data Collections: Explained

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

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

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

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

Managing Planning Source Systems for Data Collections: Explained

To populate the planning data repository, also known as the order orchestration and planning data repository, you collect data from the Oracle Fusion source system. On the Manage Planning Source Systems page in one of the Supply Chain Planning work areas, enable organizations for collections. Depending on your security privilege, you can also enable organizations from the Setup and Maintenance work area, Supply Chain Planning offering. From the Setup: Supply Chain Planning page, click the Supply Chain Planning Configuration functional area and then click the Manage Planning Source Systems task.

The Oracle Fusion Source System

The Oracle Fusion source system is included as a source system for data collection. Supply chain planning, order orchestration, and order promising processes use data that are stored in the planning data repository. You ensure the Collections Allowed check box is enabled and manage which organizations you enable for collections. To open the Manage Trading Community Source Systems page, navigate to the Setup and Maintenance work area, and select the Supply Chain Planning offering. On the Setup: Supply Chain Planning page, click the Supply Chain Planning Configuration functional area. On the Supply Chain Planning Configuration page, you may have to select All Tasks from the Show drop-down list to view the Manage Trading Community Source System task.
External Source Systems

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

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

Version External

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

Version Others

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

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

For more information on types of data that can be collected for each source system, see the Using the Import Templates to Create the CSV Files: Explained topic.

Organizations Enabled for Data Collections

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

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

1. Click the Manage Organization List button for your Oracle Fusion source system.
2. Click the Refresh Organization List button to update the organizations list.
3. Select the Enable for Collections check box for the organizations from which you want to collect data.

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

To enable organizations for data collections when the source system version is External (completely external source system), upload organizations using the file-based import process. The organizations are automatically enabled for collections.

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

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

**Related Topics**
- Using the Import Templates to Create the CSV Files for Supply Chain Planning: Explained

### Managing Planning Profile Options: Critical Choices

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

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

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

- Order Promising Sourcing Assignment Set
- Order Promising Horizon in Days

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

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

### Supply Chain Planning Processes

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

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Default Value</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catalog for Sourcing Assignments</td>
<td>Not applicable</td>
<td>Defines the catalog to be used when defining sourcing assignment sets.</td>
</tr>
<tr>
<td>Decimal Precision for Quantity Display</td>
<td>3</td>
<td>Sets the precision to which quantities are rounded for display in planning products.</td>
</tr>
<tr>
<td>Default Bookings History Measure</td>
<td>Booked Item by Booked Date</td>
<td>Specifies the default bookings history measure to use in demand forecasting.</td>
</tr>
</tbody>
</table>
### Profile Option Display Name | Default Value | Effect
--- | --- | ---
Default Capacity Display Calendar | Not applicable | Specifies the default calendar to use for the display of supplier capacity and resource availability in supply plans.
Default Shipments History Measure | Requested Item by Shipped Date | Specifies the default shipments history measure to use in demand forecasting.
Disable Search Warning in Planning Pages | No | Defines whether to disable the displaying of a warning when users try to run a search without including certain key criteria used to limit the amount of information returned.
Enable Data Security for Planning | No | Enables planning data security to determine access to Item, Organization, Customer, and Supplier data.
Fixed Plan Start Date | Not applicable | Specifies the fixed plan start date for planning applications, and in order promising, for selected organizations using the MM/DD/YYYY date format.
Full Data Access Allowed for Entities with No Conditions Defined | Yes | Enables full data access allowed, instead of no data access allowed, for entities with no data access conditions defined.
Maximum Rows Displayed in Planning Search Pages | 100000 | Sets the maximum number of rows to display for searches that return large volumes of data.
Plan to Display Automatically | Not applicable | Specifies the name of the plan to be automatically displayed.
Share Plan Partitions | No | Specifies whether a customer environment is partitioned by each plan. When enabled, a single partition is created for all plans.

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

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

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

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

### Review Supply Availability Page and Supply Availability Report
This table lists the profile options that affect the Review Supply Availability page and the Supply Availability report. If the profile option does not have a default value, the Default Value column in the table is shown as Not applicable.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Default Value</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Display Days in Review Supply Availability Page</td>
<td>21</td>
<td>Sets the number of horizon days for the Review Supply Availability page if end date was not entered on the Check Availability page</td>
</tr>
<tr>
<td>Organization Calendar for Supply Buckets in Supply Availability Report</td>
<td>Not applicable</td>
<td>Defines the organization calendar to use for the weekly and period supply buckets in the Supply Availability report</td>
</tr>
</tbody>
</table>
Assignment Set, Assignment Level Selection

This table lists the Sourcing Rule Category Set profile option. There is no default value for the Sourcing Rule Category Set profile option. You must define a value for the Sourcing Rule Category Set profile option to have the assignment levels that include categories available as choices for assignment level when creating assignment sets.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Effect</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sourcing Rule Category Set</td>
<td>Determines which category set is used when defining assignment sets</td>
<td></td>
</tr>
</tbody>
</table>

Related Topics

- Profile Options: Overview
- Hierarchy in Profile Levels: Explained

Enabling Organizations for Data Collections: Points to Consider

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

Deciding Which Organizations to Enable for Collections

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

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

Defining Your Flexfield Mappings: Procedure

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

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

Perform the following procedure to define the flexfield mappings:

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

**Related Topics**
- Flexfields: Overview
3 Implementing 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.

![Collections Processes Diagram]

Collect Planning Data

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 collections 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 Planning 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]

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

To perform a complete refresh of the data repository used by the Supply Chain Planning products, run a targeted collection. You can run the targeted collection immediately or you can schedule the process to run later. Demand planning data can only be collected by using the Targeted collection type.

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

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

1. Access the Collect Planning Data page from a Supply Chain Planning work area or the Setup and Maintenance work area.
   - If you are in the Setup and Maintenance work area:
     i. Select your offering.
     ii. On the Setup: Supply Chain Planning page, click the Supply Chain Planning Configuration functional area.
     iii. Click the Collect Planning Data task.
   - If you are in one of the Supply Chain Planning work areas:
     i. Click the Tasks panel tab.
     ii. In the Tasks panel drawer, click the Collect Planning Data link.

2. On the Collect Planning Data page, complete the following steps.
   - On the Parameters tab:
     i. Select your source system.
     ii. For the collection type, select Targeted.
     iii. Click Select Collection Filters to select the collection filters.

   - On the Reference Data subtab, move the required reference entities to the Selected Entities area.
   - On the Demand Planning Data subtab, set options to collect the historical demand data in the planning data repository. The planning process uses the historical demand data for statistical forecasting.

   - Collection Time Frame Options: You can specify a fixed or rolling date range for which to collect data.
     The Fixed Date Range option enables you to collect history data within a fixed date range that you specify.
The **Rolling Date Range** option enables you to collect the history data for the number of days that you specify. For example, if you forecast weekly, specify 7 in the **Number of Days to Collect** field to collect the demand history data once per week. The data collections collect the demand history data for the latest week.

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

- **History Measures and Attributes**: Select your shipments history and bookings history measures.
- **History Data Options**: To collect only specific order types, select from the **Order Types to Include** list of values. By default, all order types are included.

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

If you select the **Collect historical transfer orders** check box, transfer orders are collected and are included in the shipments and bookings measures.

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

  - **Collect Price Lists**: Collect the price lists specified in the collections filter for price lists, or collect all price lists if no filter is specified.
  - **Collect Configure to Order Data**: If you selected history measures and attributes, then select the relevant check boxes to collect shipment history options and booking history options.

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

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

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

**Related Topics**

- **Transfer Order Forecast Consumption: Explained**
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.
   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**
   - **Currency**
     - Currency Conversion Type
       - Currency Conversion Rate
   - **Calendar***
   - **Demand Class**
   - **UOM**
     - **Location**
       - UOM Conversions
     - **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.

Calendar Upload Sequence

- Calendar
  - Calendar Shifts
  - Calendar Exceptions
  - Period Start Days
  - Week Start Dates
  - Calendar Workday Pattern
  - Generate Calendar Dates Post Collection
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 for Supply Chain Planning: 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.

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<th>Collections Entity</th>
<th>Link in Data Import Guide</th>
<th>XLSM File Name</th>
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<td>ScpApprovedSupplierListImportTemplate. xlsm</td>
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**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.

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<th>XLSM File Name</th>
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<td>ATP Assignments and ATP Rules</td>
<td>Supply Chain Planning Available-to-Promise Rules</td>
<td>ScpATPRulesImportTemplate. xlsm</td>
</tr>
<tr>
<td>Supply Update Rule</td>
<td>Supply Chain Planning Real Time Supply Updates</td>
<td>ScpRealTimeSupplyUpdatesImportTemplate. xlsm</td>
</tr>
<tr>
<td>Freight Terms, FOB Points, Invoicing and Accounting Rules, Shipment Priorities,</td>
<td>Supply Chain Planning Order Orchestration</td>
<td>ScpOrderOrchestrationImportTemplate. xlsm</td>
</tr>
<tr>
<td>Payment Terms, Return Reason, Tax Classification Code, Tax Exemption Reason,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sales Credit Type, Activity Type, Document Categories, Payment Methods, and</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Receipt Methods</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Booking History</td>
<td>Supply Chain Planning Bookings History</td>
<td>ScpBookingHistoryImportTemplate. xlsm</td>
</tr>
<tr>
<td>Option Booking History</td>
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<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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<tr>
<td>Option Shipment History</td>
<td>Supply Chain Planning Option Shipments History</td>
<td>ScpOptionShipmentHistoryImportTemplate. xlsm</td>
</tr>
<tr>
<td>Price Lists</td>
<td>Supply Chain Planning Price Lists</td>
<td>ScpPriceListImportTemplate. xlsm</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>Causal Factors</td>
<td>Supply Chain Planning Causal Factors</td>
<td>ScpCausalFactorsImportTemplate. xlsm</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>
<td>ScpExternalForecastImportTemplate. xlsm</td>
</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>
<td>ScpRoutingsImportTemplate. xlsm</td>
</tr>
<tr>
<td>Work Order Supply</td>
<td>Supply Chain Planning Work Order Supplies</td>
<td>ScpWorkOrderSupplyImportTemplate. xlsm</td>
</tr>
<tr>
<td>Work Order Material Requirements</td>
<td>Supply Chain Planning Work Order Component Demands</td>
<td>ScpWIPComponentDemandImportTemplate. 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 (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 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 Entity</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. xlsx</td>
</tr>
<tr>
<td>Item Costs</td>
<td>Supply Chain Planning Item Cost</td>
<td>ScpItemCostImportTemplate. xlsx</td>
</tr>
<tr>
<td>Item Relationships</td>
<td>Supply Chain Planning Item Substitute</td>
<td>ScpItemSubstituteImportTemplate. xlsx</td>
</tr>
<tr>
<td>Catalogs, Categories, and Item Categories</td>
<td>Supply Chain Planning Catalogs</td>
<td>ScpCatalogImportTemplate. xlsx.xlsm</td>
</tr>
<tr>
<td>Item Structures</td>
<td>Supply Chain Planning Item Structures</td>
<td>ScpBillofMaterialImportTemplate. xlsx</td>
</tr>
<tr>
<td>Bill of Resources</td>
<td>Supply Chain Planning Bill of Resources</td>
<td>ScpBillOfResourcesImportTemplate. xlsx</td>
</tr>
<tr>
<td>Planners</td>
<td>Supply Chain Planning Planners</td>
<td>ScpPlannersImportTemplate. xlsx</td>
</tr>
<tr>
<td>Customers and Customer Sites</td>
<td>Supply Chain Planning Customers</td>
<td>ScpCustomerImportTemplate. xlsx</td>
</tr>
<tr>
<td>Regions</td>
<td>Supply Chain Planning Regions</td>
<td>ScpRegionsImportTemplate. xlsx</td>
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<tr>
<td>Zones</td>
<td>Supply Chain Planning Zones</td>
<td>ScpZonesImportTemplate. xlsx</td>
</tr>
<tr>
<td>Region-Zone Mapping</td>
<td>Supply Chain Planning Region Zone Mappings</td>
<td>ScpRegionZoneMappingImportTemplate. xlsx</td>
</tr>
<tr>
<td>Locations and Region-Location Mapping</td>
<td>Supply Chain Planning Locations</td>
<td>ScpLocationsImportTemplate. xlsx</td>
</tr>
<tr>
<td>Organizations and Organization Sites</td>
<td>Supply Chain Planning Organizations</td>
<td>ScpOrganizationImportTemplate. xlsx</td>
</tr>
<tr>
<td>Collection Entities</td>
<td>Link in FBDI Guide</td>
<td>XLSM File Name</td>
</tr>
<tr>
<td>----------------------------------------------------------</td>
<td>--------------------------------------------------------</td>
<td>----------------------------------------------------</td>
</tr>
<tr>
<td>Subinventories</td>
<td>Supply Chain Planning Subinventories</td>
<td>ScpSubInventoryImportTemplate. xlsx</td>
</tr>
<tr>
<td>Suppliers and Supplier Sites</td>
<td>Supply Chain Planning Suppliers</td>
<td>ScpSupplierImportTemplate. xlsx</td>
</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, Shifts, Shift Workday Pattern, Week Start Dates, and Period Start Dates</td>
<td>Supply Chain Planning Calendars</td>
<td>ScpCalendarImportTemplate. xlsx</td>
</tr>
<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>
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<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>Collection Entities</td>
<td>Link in FBDI Guide</td>
<td>XLSM File Name</td>
</tr>
<tr>
<td>---------------------</td>
<td>--------------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Booking History</td>
<td>Supply Chain Planning Bookings History</td>
<td>ScpBookingHistoryImportTemplate. xlsm</td>
</tr>
<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>
</tr>
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<td>Option Shipment History</td>
<td>Supply Chain Planning Option Shipments History</td>
<td>ScpOptionShipmentHistoryImportTemplate. xlsm</td>
</tr>
<tr>
<td>Price Lists</td>
<td>Supply Chain Planning Price Lists</td>
<td>ScpPriceListImportTemplate. xlsm</td>
</tr>
<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>
<td>ScpOnhandImportTemplate. xlsm</td>
</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.

### Collection Entities

<table>
<thead>
<tr>
<th>Collection Entities</th>
<th>Link in FBDI Guide</th>
<th>XLSM File Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Definition (including mapping between Item Structures and Work Definitions), Work Definition Operations, Work Definition Operation Resources</td>
<td>Supply Chain Planning Routings</td>
<td>ScpRoutingsImportTemplate. xlsx</td>
</tr>
<tr>
<td>Work Order Supply</td>
<td>Supply Chain Planning Work Order Supplies</td>
<td>ScpWorkOrderSuppliesImportTemplate. xlsx</td>
</tr>
<tr>
<td>Work Order Material Requirements</td>
<td>Supply Chain Planning Work Order Component Demands</td>
<td>ScpWIPComponentDemandsImportTemplate. xlsx</td>
</tr>
<tr>
<td>Work Order Resource Requirements</td>
<td>Supply Chain Planning Work Order Operation Resources</td>
<td>ScpWIPOperationResourceImportTemplate. xlsx</td>
</tr>
<tr>
<td>Planned Order Supplies</td>
<td>Supply Chain Planning Planned Order Supply</td>
<td>ScpPlannedOrderSupplyImportTemplate. xlsx</td>
</tr>
<tr>
<td>Sourcing Rule and Assignments</td>
<td>Supply Chain Planning Sourcing Rules</td>
<td>ScpSourcingImportTemplate. xlsx</td>
</tr>
<tr>
<td>Key Customer Options</td>
<td>Supply Chain Planning Key Customer Options</td>
<td>ScpKeyCustomerOptionsImportTemplate. xlsx</td>
</tr>
</tbody>
</table>
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**.

![Image](image.png)

**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

When using one of the Supply Chain Planning work areas, you can differentiate between key customers and non-key customers. Use the ScpKeyCustomerOptionsImportTemplate.xlsm file to identify the key customers for which non-aggregated 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.

**Note:** For details regarding the ScpKeyCustomerOptionsImportTemplate.xlsm file, refer to the File-Based Data Import for Oracle Supply Chain Management Cloud guide. This guide is one of the guides for Oracle Supply Chain Management Cloud Release 13 (update 18C), in the Development category. Use the Books link for a list of the guides by category.

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>
</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 Suites 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.
4 Configuring 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.

Related Topics
- Disabling and Enabling Dimensions for Supply Plan Measures in Supply Chain Planning: Explained

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.

Related Topics
• Disabling and Enabling Dimensions for Supply Plan Measures in Supply Chain Planning: Explained

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.
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.

**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.