Oracle SCM Cloud

Using Backlog Management

20A
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Preface

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

Using Oracle 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 the Oracle Help Center to find guides and videos.

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

You can also read about it instead.

Additional Resources

- **Community:** Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.
- **Training:** Take courses on Oracle Cloud from Oracle University.

Conventions

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

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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>
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Documentation Accessibility

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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.

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1 Introduction

Why You Use Backlog Management

You use the Backlog Management work area to plan the fulfillment of orders that are at risk of delay. Let's first understand the pain points associated with optimizing order fulfillment, and then learn how the backlog management application can resolve them.

Pain Points in Order Management

Orders are scheduled in real time by Global Order Promising Cloud from Order Management. Orders that arrive first get scheduled for fulfillment first. So, important orders may not get satisfactory scheduled dates if they were created after other orders, which already consumed supply because they were scheduled earlier. Also, item supply availability changes daily, so the current scheduled dates on orders may not be realistic. For example, some dates could have been pulled in because of others, and some may be delayed or moved out because the supply situation got worse.

To change scheduled dates after identifying which orders are affected by changed supply availability, order managers would have to first select orders in Order Management or in Global Order Promising and then simulate promising. This is a manual, drawn-out process.

How Backlog Management Helps

Backlog Management makes it easy to identify orders with scheduled dates that are at risk and which can be improved. The fulfillment for these orders can then be mass-planned manually or through a scheduled process. Orders are prioritized for fulfillment based on a user-specified priority sequence. According to this priority sequence, supply is allocated to orders to determine Planned dates on those orders. Users compare planned dates with existing scheduled dates to understand how much an order’s fulfillment prospects can improve.

Users can also perform a variety of simulations to influence the planning results. For example, they can reprioritize orders, decommit some orders, and even change attribute values to run a planning simulation without impacting the actual scheduling information. Any updates to the actual scheduling information happen only when the user releases planning results after backlog planning.

Overview of Backlog Management Processes

Backlog management involves a sequence of four activities:

1. **Planning the backlog.** Do this using plan run actions in the Backlog Analysis UI or with a scheduled process that can plan the backlog at a specific time.
   - You specify a demand priority rule on the basis of which the orders are prioritized.
   - You can plan your entire backlog or you can use filters to plan by specific items, categories, and organizations.
2. **Reviewing backlog planning results.** You can do this in two ways:
   - Using the Backlog Analysis UI, which tabulates results for each planned order. These results can be called using a range of search criteria.
   - Using the Backlog Analytics UI, which presents result statistical data in the form of graphs and infotiles.

3. **Simulating and adjusting attribute values.** After reviewing planned results, you can modify order attribute values and replan those orders to see how fulfillment prospects vary. Here's what all you can do:
   - Change the organization and shipping method
   - Decommit lower priority demands
   - Plan the same orders using other demand priority rules
   - Override priority on specific orders
   - Remove constraining items from a shipment or arrival set

4. **Releasing planning results to your order management system.** Do this using release actions in the Backlog Analysis UI, or have the application do it through a scheduled process.

   Until you release your Planned values from Backlog Management, they remain as simulations within the application, and can't impact actual order scheduling.

### Integration with Other Cloud Services


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<th>Cloud Service Name</th>
<th>Integration with Backlog Management</th>
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<td>Order Management</td>
<td>Scheduled sales orders are collected from Order Management and planned in Backlog Management. When backlog planning is completed and planning results for some orders are released, the planning results automatically replace the scheduling information on these orders in Order Management.</td>
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<td>Global Order Promising</td>
<td>Planning results on orders released from Backlog Management replace the scheduling information on those orders in Global Order Promising. This happens when the order promising engine is restarted after results are released.</td>
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2 Planning Setups

Data Preparation and Planning Configuration

You need to prepare and configure data for features that will impact the backlog planning process. Do so using the links in the Tasks panel of the Backlog Management work area. Here's a list of these tasks:

**Collect Planning Data**

Use this task to collect the sales order data that needs to be used for backlog management. The other relevant collections tasks are **Load Planning Data from Files**, **Manage Planning Data Collection Processes**, and **Manage Planning Source Systems**. You can collect data from an Oracle Fusion source system or from an external source system. If your enterprise uses Oracle Fusion Order Management, you collect scheduled sales orders and predefined sales order attributes. In the Backlog Management work area, you can also collect unscheduled sales orders and user-defined sales order attributes, but only from external order management systems. To know more about collections, refer to the Planning Data Collections chapter.

**Maintain Network Supply Model**

Use this task to review collected data. Key attributes include the drop ship validation organization, and the time zone used to associate organizations, suppliers, and customer sites. To know more, refer to the Manage Network Supply Model chapter.

**Manage Sourcing Rules**

Use this task to define supply sources and draw up date-based sourcing strategies. To know more, refer to the Sourcing Rules, Bills of Distribution, and Assignment Sets chapter.

**Manage Bills of Distribution**

Use this task to implement supply sources when supply flows through more than two organizations. To know more, refer to the Sourcing Rules, Bills of Distribution, and Assignment Sets chapter.

**Manage Assignment Sets**

Use this task to a sourcing rule or bill of distribution to an assignment sourcing level in order to implement the supply chain network. If your enterprise uses Global Order Promising, the assignment sets there can be used as-is in Backlog Management. To know more, refer to the Sourcing Rules, Bills of Distribution, and Assignment Sets chapter.

**Manage Demand Priority Rules**

Use this task to define the rules that prioritize orders for fulfillment based on rankings of order attributes. The order priorities determine which demands have more access to supply. You can create multiple demand priority rules, and alternate between rules to understand how planning results change. Remember that you must set up demand priority rules, otherwise you can't plan the backlog. To know more, refer to the Demand Priority Rules chapter.

**Manage Backlog Planning Rules**

Use this task to define rules that determine what kind of supply can be used for demand fulfillment. You can configure supply items to be available infinitely, available after a lead time, or available based on their supply type. Remember that for an item to be used in the planning process, it must be assigned to backlog planning rule. To know more, refer to the Backlog Planning Rules chapter.
Manage Backlog Planning Options

Use this task to configure default parameters for your backlog planning runs. To know more, refer to the Backlog Planning Options topic in this chapter.

Additional tasks

The remaining four tasks pertain to planners and planning calendars. If your enterprise has set up calendar and planner data in other cloud services like Supply Planning and Global Order Promising, then that data will be respected during backlog planning.

Backlog Planning Options

Before you run plans in the Backlog Management work area, use the Manage Backlog Planning Options task to configure key backlog planning attributes. Your configuration settings serve as default specifications for processes like supply sourcing and reallocation. Here's the list of options:

Planning Horizon in Days
This is a duration measured from the horizon start date. Demands with requested dates within this horizon only are planned. So if the horizon start date is today and you specify 100 as the planning horizon value, then the planning process will plan orders with requested dates that fall within the next hundred days only.

Horizon Start Date
It's the date from which the planning horizon is calculated. The default start date is the present day. If you change it to a future date, then the horizon will be calculated from that day.

Assignment Set Name
The name of the assignment set that contains the sourcing rules and bills of distribution used to implement your supply chain network.

Demand Priority Rule
This is the rule that the backlog planning process uses to prioritize orders for fulfillment. The rule you specify is the default demand priority rule, which means that this rule is always used unless you specify another one before taking plan run actions.

Past-Due Supply and Demand Considered in Days
This is a duration measured backward from the horizon start date. When a demand's scheduled date or a supply's expected date falls prior to the horizon start date, this demand or supply is termed past-due. The duration you specify determines how many days prior to the horizon start date a past-due demand or supply is valid for to be considered by the backlog planning process. You can override the value specified here while defining a backlog planning rule.
Demand Fulfillment Lead Time in Days

The number of days from the requested date within which your customer, by contract, expects the order’s fulfillment. This value is used to calculate the fulfillment lead time date. So if you specify 5 as the value here, and the requested date is 1/20/2020, then the lead time date would be 1/25/2020, assuming there are no holidays in between.

Category Set

This is a group of item categories used by the backlog planning process while assigning backlog planning rules by category. The default value is GOP_Catalog. You can’t edit this value on this page because it’s derived from the profile MSC_SRC_ASSIGNMENT_CATALOG in Oracle Fusion Global Order Promising.
3 Planning Processes

Key Actions on Orders

When you navigate to the Backlog Management work area, the Backlog Analysis table UI opens by default. Use this UI to search for orders, to plan them interactively, and to simulate changes to attributes between plan runs. When you finish planning, you can save planning results and take release actions in this UI.

Search Actions

Search for orders using search criteria, which include all order attributes. You can use the Add Fields action to include attribute criteria that are hidden. You can also set up or save specific search results:

- Use the Manage Conditions action in the Search region to create a set of attribute-based search filters. Each set is called a condition. Using a condition, you can filter the backlog to see search results only for orders that meet your condition criteria.
- Use the Save action in the search region to save a particular search after giving it a name. This lets you preserve search criteria and the results for those criteria, so that you can revisit this search using the drop-down list of names in the Saved Search field.

Plan Run Actions

Use plan run actions Run Plan or Refresh and Plan to plan your backlog.

- All orders in your search results are planned.
- You can also change the demand priority rule and rerun the plan to see how fulfillment prospects change.

You can also run plans using a scheduled process. To know more, refer to the Run Plans section in this chapter.

Review Actions

The plan run ranks your orders in priority sequence on the basis of the demand priority rule. It also calculates and displays planning results for your orders that correspond to scheduling and requested information. Here's what you need to do:

- Review and compare Planned values with their corresponding Scheduled and Requested Attributes.
- Some rows represent sets, and the set name will be displayed for such rows. Use the Manage Set action to review results for set's constituent lines.
- To view analytics for the planned orders, use the page-level Open action and open the Backlog Analytics graph.

To know more, refer to the Review Planning Results section in this chapter.
Attribute Data Simulation Actions

Plan runs yield planning results, which you can review and take further action on, before rerunning the plan to get new planning results. These actions control how the planning process treats your planning results and the existing scheduling information in the next plan run. Here’s the list of simulations:

- Changing the Enforce Current Commit column value to No
- Changing the Pull-in Enabled column value to No
- Locking planning results using the Lock Planning Results action, or by changing the Locked column value to Yes for individual lines.
- Manually overriding planning results using the Override Planning Result action, or by changing the Manually Overridden column value to Yes for individual lines.
- Removing constraining items from a set using the Remove from Set action.

Because these are simulations within Backlog Management, they don’t impact actual scheduling information that’s visible to your customers. To know more about these simulations, refer to the Simulate Changes to Attribute Values section in this chapter.

Release Actions

When you’re satisfied with the Planned values, you need to prepare them for release and then release them to the order management system:

- Use the Save Planning Results action to save Planned values to the backlog planning data repository.
- Use the Mark for Release action on selected rows to indicate that they’re ready for release.
- Use the Release Planning Results action to release them to your order management system.

You can also release planning results using a scheduled process. To know more, refer to the Release Planning Results topic in this chapter.

Run Plans

Overview of Plan Runs

After searching for orders, you need to plan them using demand priority rules. You run plans for two reasons:

- To view how orders are prioritized for fulfillment on the basis of the rule you specified
- To obtain planning results for each order. Planning results for an order correspond to the existing scheduling information on that order, and they indicate whether an order’s fulfillment can be improved beyond its scheduled date.

Here’s how the plan run process works:

1. You select a demand priority rule and click a plan action.
2. The planning process calculates priority values for each order based on the attribute ranking and attribute value rankings specified in the rule.
3. Supply is redistributed among orders based on their calculated priority values. By default, supply is redistributed so that scheduled dates on all orders are respected.
4. Based on how much supply is allocated to each order, the planning process determines Planned values, such as the Planned Date and the Planned Shipping Method, that correspond to existing Scheduled Values.

**Note:** Backlog Management primarily uses supply that’s already reserved for an order. Additional available supply is considered only after reserved supply is used up. To know if an order has reserved supply, check if there's a chain link icon at the start of the order row, or if the value in the **Reservation Status** column is **Yes**. You can also review the reserved supply quantity, the reserved supply document number, and the reserved supply type for each order. To know more about reservations, refer to the Reservations in Supply Chain Planning topic.

**Related Topics**
- Reservations in Supply Chain Planning

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## Plan Run Types

You can run plans in three ways. This table explains them:

<table>
<thead>
<tr>
<th>Plan Run Action Name</th>
<th>Objective</th>
<th>How You Do It</th>
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</table>
| Run Plan                             | To plan the backlog by reallocating supply that’s already pegged to the orders in your search results. | 1. On the Backlog Analysis page, use search filters to view the orders you want to plan.  
2. Click **Run Plan**.               |
| Refresh and Plan                     | To plan the backlog after reading in latest supply data on the orders in your search results. In this mode, enough supply is retained to also honor scheduled dates on orders outside the search results that require the same supply items. | 1. On the Backlog Analysis page, open the Run Plan menu.  
2. Click the **Refresh and Plan** action. |
| Start Backlog Planning scheduled process | To schedule a plan run at regular intervals, which reads in latest supply and demand data from the collected data. | 1. On the Scheduled Processes page, click the Schedule New Process action.  
2. Search for the Start Backlog Planning job and click OK.  
3. In the Process Options dialog box, specify the demand priority rule. If you don’t specify a rule, the process uses the default demand priority rule that’s defined on the Manage Backlog Planning Options page.  
4. Define values to plan orders by organization, category, items, and customers. If you don’t specify any of these, then your entire backlog will be planned.  
5. Click Submit.                        |

**Note:** The options in Step 4 are filters to let you specify which orders you want to plan. Let’s say you specify just the item, Item A.
### Simulation Demands

If your enterprise uses an external order management system, you can simulate and plan entire orders before they're actually created. This helps you anticipate how real orders with the same data will impact planning results in Backlog Management. These mock orders are called simulation demands or inquiry demands.

#### How You Create, Delete, and View Simulation Demands

You use the FBDI process to load sales order data through CSV files, in which you specify order attribute values.

- To define an order as a simulation demand, specify Yes the Inquiry Demand column of the CSV file.
- To delete a simulation demand, go back to the FBDI document, set the Delete Indicator value to No, and reload the file.

In the Backlog Analysis table, simulation demands appear together with real sales orders. To tell them apart, check if the Simulation Demand column value is Yes or No.

#### Considerations While Using Simulation Demands

- The Simulation Demand attribute is a demand priority attribute. So, you can create and use a demand priority rule that prioritizes simulation demands over real ones.
- Real demands and simulation demands are planned using the same planning logic. But planning results for simulation demands don’t impact backlog analytics, unlike the planning results of actual sales orders.
- You can’t save and release planning results for simulation demands.

**Tip:** Have your simulation demand data cleared out regularly. To do so, use the Delete Backlog Planning Session Data scheduled process. In the Process Details dialog box, select the **Delete inquiry demands** check box.

#### Related Topics

- How You Load Planning Data from Files
- Define a Demand Priority Rule
Review Planning Results

How You Review Results on Individual Orders and Sets

Planning results on individual orders and sets are updated in the Backlog Analysis table when you run the plan. Here’s how you review them:

- Compare the Planned dates with their corresponding Scheduled and Requested dates to know whether your order’s fulfillment prospects have changed.
- Review results for other attributes like the Planned organizations, Planned shipping method, and so on.
- Review calculated priority values.
- Some rows represent sets. Use the Manage Set action to view constituent order lines. Compare the requested, scheduled, and planned values with the Item Availability Date, the Planned Date Without Item, the Improvement Potential Without Item, and the items’ Constraint Rank values. The planned date for the most constraining item is the planned date of the set.

If you’re satisfied with the results, save them. Remember that the Save Planning Results action doesn’t automatically deliver planning results to the order management system; it only saves results to the backlog planning data repository so that they can be displayed in subsequent user sessions, until new results for the planned orders are saved.

Tip: You can take actions to lock or override planning results. You can also decommit some orders or prevent the planning process from considering some orders for fulfillment. While reviewing sets, you can remove constraining items. To know more, refer to the Simulate Changes to Attribute Values section in this chapter.

Key Order Attributes

Reviewing planning results involves the comparison of some key order attributes. We group them as Requested attributes, Scheduled attributes, Planned attributes, Calculated attributes, and Backlog Planning Control attributes.

Requested Attributes

Requested attribute values are specified during order creation. They’re collected during the data collection process, and you can simulate changes to some of them in the Backlog Analysis table. Here are the key requested attributes:

- Requested Date. The date for which the order was requested.
- Request Type. Orders can be of the shipment or arrival type, as specified by the customer. If the type is shipment, the customer has requested for the order to be shipped. If it’s arrival, the customer has requested for the order to be delivered at the customer site.
- Requested Ship-from Organization. The value defaults to the organization on the order line, but you can change it.
- Requested Drop Ship Supplier Site.
- Requested Item.
- Requested Shipping Method. This is the concatenation of shipping information, namely the requested carrier, requested mode of transport, and requested service level. You can edit the method value, but you can’t change values for individual method components.
In addition to these, your customer also defines the **Earliest Acceptable Date** and **Latest Acceptable Date** for an order. The order also carries a **Demand Fulfillment Lead Time** value that your enterprise and the customer agreed upon. You can't change them, and the engine respects them during planning.

### Scheduled Attributes

Scheduled values are determined by Global Order Promising, and are always available only if your enterprise uses Oracle Fusion Order Management. Here are the key scheduled attributes:

- **Scheduled Ship Date** and **Scheduled Arrival Date**.
- **Scheduled Date**. It's the same as the Scheduled Ship Date if the request type is Shipment. It's the same as the Scheduled Arrival Date if the request type is Arrival.
- **Scheduled Ship-from Organization**, also known as the drop ship supplier.
- **Scheduled Shipping Method**.

You can't edit Scheduled values.

### Planned Attributes

Planned attribute values are determined in Backlog Management. Planned attributes are displayed only after you run plans. Here are the key planned attributes:

- **Planned Ship Date** and **Planned Arrival Date**.
- **Planned Date**. It's the same as the Planned Ship Date if the request type is Shipment. It's the same as the Planned Arrival Date if the request type is Arrival.
- **Planned Ship-from Organization**, also known as the drop ship supplier.
- **Planned Shipping Method**. This is the concatenation of shipping information, namely the requested carrier, requested mode of transport, and requested service level. You can edit the method value, but you can't change values for individual method components.

You can override Planned values to simulate different planning outcomes.

### Calculated Attributes

Some attribute values are calculated during the backlog planning process on the basis of planned, scheduled, and requested attributes:

- **Fulfillment Lead Time Date**. This value is calculated using the demand fulfillment lead time, which is the number of days post the requested date within which the order must be fulfilled. This lead time value is mutually decided by your enterprise and your customer, and is updated through a REST service. The fulfillment lead time date can also be specified through a REST service; else it's calculated in Backlog Management from the specified lead time.

- **Calculated Priority**. The planning process calculates a priority value for every order using the demand priority rule you specified. These values are always in multiples of ten, with 10 being the highest priority value. If a row represents a set, the displayed calculated priority value will apply on the entire set, and all constituent items will have the same value.

- **Scheduled Days of Delay**. It's the difference in working days between the Scheduled Date and the Requested Date.

- **Planned Days of Delay**. It's the difference in working days between the Planned Date and the Requested Date.

- **Days of Improvement**. The difference between the planned days of delay and the scheduled days of delay. A positive value implies that the planned values are an improvement on the scheduled values.
• **Order Revenue.** It's the product of the selling price and the requested quantity. A row that represents a set displays the total order revenue of all lines in the set. Selling Price and Requested Quantity are both collected attributes.

• **Order Margin.** It's the difference between the order revenue and the order fulfillment cost, which is a collected attribute.

### Set-Related Attributes

When you review planning results for a shipment or arrival set, remember that the planned date for its most constrained item becomes the planned date for the entire set, and this is planned date displayed for the row that represents the set. For such a row, the order revenue displayed is the total revenue of all its constituent lines. In addition to the requested, scheduled, and planned values, there are a few more relevant attributes that you compare while reviewing a set:

• **Item Availability Date.** The date when an item will be available. All items with an item availability date later than the requested date are treated as constraining items, and they get constraint-ranked.

• **Constraint Rank.** Values that indicate which items are more constraining, with 1 being the most constrained value.

• **Planned Date Without Item.** The planned date of the set with regard to a specific constraint rank, if all items with an equal or higher constraint rank are removed from the set.

• **Improvement Potential Without Item in Days.** The number of days by which the planned date of a set with regard to a specific constraint rank will improve if all items with an equal or higher constraint rank are removed from the set.

• **Original Set Name.** The name of the set a line belonged to before it was removed from the set.

### Backlog Planning Control Attributes

You use some attributes in the Backlog Analysis UI to control how the planning process respects your scheduled and planned values:

• **Override Priority.** This attribute retains the corresponding calculated priority value, but you can override that calculated value in this column and rerun the plan.

• **Enforce Current Commit.** When the value is Yes, the scheduled date on the order will be respected. If you change it to No, its planned date can end up being later than its scheduled date.

• **Pull-in Enabled.** When the value is Yes, the planning process considers the order for improvement. If you change it to No, the order won't be considered for improvement, but its scheduled date will still be respected.

• **Locked.** A lock icon at the start of a row indicates that the planning results for that order were locked. You can lock results by setting the Locked Status value on an order to Yes or by using the Lock Planning Results action on multiple orders.

• **Manually Overridden.** A pencil icon at the start of a row indicates that the planning results for that order which were determined by the planning process were overridden manually. You can override results by first setting the Manually Overridden value on an order to Yes or by using the Override Planning Result action on orders.

These attributes are specific to Backlog Management and aren't included in collected data. To know more about enforcing current commits, pulling in orders, locks, and manual overrides, refer to the Simulate Changes to Attribute Values section in this chapter.
Other Attributes

There are a few more attributes worth considering when you review planning results:

- **Simulation Demand.** An order simulation that's loaded into Backlog Management using the collection process, that's planned just like a real sales orders. If the column value is **Yes**, the row doesn't represent a simulation demand. Planning results on simulation demands don't affect analytics and can't be released.

- **Reserved.** An order for which supply has been reserved is marked with a chain-link icon. Reserved lines are also identifiable by the **Yes** value in the Reserved column.

- **Configuration Item.** The top-level configured item for CTO orders.

- **Demand Source System.** The source system the demand was collected from.

- **Demand Class.** A classification of customers or demand sources for an order. This is a collected attribute that you can't modify.

- **Error Text.** If the order isn't modeled viably for planning, an error message is displayed when you attempt a plan run. The error text column displays one of these values: **Requested Date Out of Range**, **Sourcing Failed**, **Invalid Item and Organization Combination**, or **Invalid Organization and Ship Method Combination**

- **Fulfillment Cost.** The cost of fulfilling the order. It is collected from Oracle Fusion Order Management.

- **Item Type.** The type of the requested item. It can be **Standard** or **ATO Model**.

- **Last Updated By.** The user who updated the demand most recently. If the demand was updated by a scheduled process, the value displayed is FUSION_RUNTIME.

- **Last Updated Date and Time.** The date and time when the demand was last updated.

- **Notes.** Users can add notes for an order. Notes are retained when the order is replanned.

- **Order Creation Date and Time.** It's a collected attribute.

- **Planner.** The planner responsible for a demand line. It's a collected attribute.

- **Selling Price.** The price of an item per unit. It's a collected attribute used to calculate the order revenue.

- **Ship-to Organization.** It's a collected attribute valid only for orders sourced from Oracle Fusion Order Management.

  **Note:** Your enterprise may have loaded additional attributes into Backlog Management. Values for these attributes appear under the **Additional Information** header in the Backlog Analysis table. To know more about user-defined attributes, refer to the How User-Defined Attributes Are Added topic in the Demand Priority Rules chapter.

Review Backlog Analytics

After running a plan, you need to review planning results. Analytics are one way in which results are presented. To view backlog analytics in the Backlog Management work area, save your planning results and open the Backlog Analytics graph. This page presents three infotiles:

- Planned Fulfillment Changes by Demand Value
- On Time Fulfillment
- Fulfillment by Lead Time Date
Planned Fulfillment Changes by Demand Value
This infotile depicts the value of orders whose dates can be improved versus the value of orders whose dates will be delayed. The time difference between the Scheduled date and the Planned date determines whether there is improvement or delay.

Drill down to view analytic data by organization:
- Review the Planning Results by Organization table. It includes the total demand line count and the revenue of orders that are delayed, unchanged, and improved. You can click on these values to view these orders in the Backlog Analysis table.
- Use the Top Delayed Demands graph to view the ten most delayed orders from a specific organization. Use the Drill To action to view these orders in the Backlog Analysis table.

On Time Fulfillment
Depicts the percentage of orders that are scheduled to be fulfilled by their requested date versus the percentage of orders that are planned to be fulfilled by their requested date.

Drill down to view analytic data by customer, organization and item category:
- These graphs account for the top ten high-revenue customers, organizations, and item categories.
- They contrast the percentages of scheduled and the percentage of planned orders for each metric, while also displaying revenues.
- While reviewing a graph, select a revenue bar and use the Drill To action to view results for orders in the Backlog Analysis table, for a specific customer, organization, or item category.

Fulfillment by Lead Time Date
Depicts the percentage of orders that are scheduled to be fulfilled by their lead time date versus the percentage of orders that are planned to be fulfilled by their lead time date. This date is calculated from the demand fulfillment lead time, which is the number of days from the requested date within which your customer, by contract, expects the order’s fulfillment. So if the fulfillment lead time is 5 days, and the requested date is 1/20/2020, the lead time date would be 1/25/2020, assuming there are no holidays in between.

Drill down to view analytic data by customer, organization and item category:
- These graphs account for the top ten high-revenue customers, organizations, and item categories.
- They contrast the percentages of scheduled and the percentage of planned orders for each metric, while also displaying revenues.
- While reviewing a graph, select a revenue bar and use the Drill To action to view results for orders in the Backlog Analysis table, for a specific customer, organization, or item category.

Note: The lead time date may be directly specified on an order, or may be calculated from the lead time specified for these orders on the Manage Backlog Planning Options page.

Release Planning Results
If you're satisfied with the results of your plan run, you can release them to your enterprise's order management system. You can release planning results from the Backlog Analysis page or from the Scheduled Processes page. Here's how you do it:
From the Backlog Analysis page:

1. Use the **Save Planning Results** action to register these results in the backlog planning data repository.
2. Select the orders whose results you want to release and use the **Mark for Release** action to make the results on these lines eligible for release. You can undo this using the **Unmark for Release** action.
3. Use the **Release Planning Results** action to actually release them.

   **Note:** The **Release Status** column tells you if an order has been marked for release. After planning, if planned values are different from scheduled values, the status is **Release**. If you mark the order for release, the status changes to **Marked for Release**. If you use the **Unmark for Release** action on the order, the status reverts to **Release**.

From the Scheduled Processes page:

1. Click the **Schedule New Process** action.
2. Search for the **Release Backlog Planning Results** job and click **OK**.
3. In the Process Options dialog box, define values for the parameters that will control your process run.
4. Click **Submit**.

After release, scheduled information in Order Management, Global Order Promising, and Supply Planning is updated. If your enterprise uses an external order management system, the release process generates a CSV file that can be used to feed planned information into that system.
4 Simulate Changes to Attribute Values

When to Override Demand Priority

When you run the backlog plan, orders are prioritized based on the demand priority rule, and supply is allocated accordingly. The order priority is inferred from the Calculated Priority values, which are in multiples of 10, with 10 being the highest-ranked value. But let's say you may want a critical order, Order X, prioritized over others, but without changing the priority sequence. To do this, you can specify an Override Priority value of, say, 1, on that order. Here's what happens when you run the plan then:

- Order X gets top priority, and its Calculated Priority value is 1.
- The former calculated priority values of other orders remain the same.

Note: Because supply needs to be redistributed when you plan after overriding priorities, the planning results of low priority orders could worsen.

Related Topics

- How Demand Priority Is Calculated Using Demand Priority Rules

When to Decommit Orders or Prevent Order Fulfillment

When you run the backlog plan, orders are prioritized based on the demand priority rule, and supply is allocated accordingly. During this process, the fulfillment prospects for some of your orders may not change, or may worsen instead of improving. Either way, it's because supply for these orders is being used to fulfill demands of other orders. But even within the prioritization sequence, you can prevent supply from reaching some orders so that it can be redistributed to other orders. You do this using two backlog planning attributes: Enforce Current Commit and Pull-in Enabled.

Enforce Current Commit

You can regulate supply allocation by forcing the planning process to respect the scheduled date for a demand. To do so, use the Enforce Current Commit option. Here's how it works:

- When the Enforce Current Commit value for some orders is Yes, the scheduled dates for these orders are retained as their planned dates. This is because the supply for the selected orders is retained, and isn't reallocated to fulfill higher priority demands.
- If you change the Enforce Current Commit value for an order to No, the supply from this order can be reallocated to another order, and this order's planned delay can be worse than its originally scheduled delay.
Pull-in Enabled

You can also improve supply for some orders by not letting the backlog planning process consider other orders for improvement. To do so, set the Pull-in Enabled value for the latter to **No** and rerun the plan. Here’s how it works:

- When the Pull-in Enabled value for some orders is **No**, the scheduled dates for those orders will be retained as planned dates, but they can’t be improved.
- If you leave the Pull-in Enabled value as **Yes**, the order can be improved up until its requested date.

Example of How Decommiting Orders Impacts Planning Results

Let’s say you’re planning three orders for the same item, sourced from the same organization. Let’s chart out the sales order attributes that are relevant before and after planning. We will review two planning scenarios: in the first, the Enforce Current Commit value will be **Yes** for all three orders, and in the second we will decommit one of them.

This table depicts the attribute values relevant for planning.

<table>
<thead>
<tr>
<th>Order Number</th>
<th>Requested Date</th>
<th>Requested Quantity</th>
<th>Scheduled Date</th>
<th>Enforce Current Commit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order 1</td>
<td>01/04/2020</td>
<td>15</td>
<td>01/11/2020</td>
<td>Yes</td>
</tr>
<tr>
<td>Order 2</td>
<td>01/06/2020</td>
<td>10</td>
<td>01/18/2020</td>
<td>Yes</td>
</tr>
<tr>
<td>Order 3</td>
<td>01/12/2020</td>
<td>5</td>
<td>01/25/2020</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Supply Availability Information

- 15 units on 01/11/2020
- 10 units on 01/18/2020
- 5 units on 01/25/2020

Key Settings for the Plan Run

- We select a simple demand priority rule REQDATE, which prioritizes demands by just by their requested date. It gives highest priority to the order with the earliest requested date.
- The Enforce Current Commit value is **Yes** for all three orders.

Planning Results When All Scheduled Dates Are Enforced

The plan was run. Our table now also includes calculated priority values and planned dates.
Orders are prioritized based on their requested date. You infer that the planned dates are no later than the scheduled dates. This is because the planning process respected the scheduled dates, based on the Enforce Current Commit value.

Now let's see what happens when the Enforce Current Commit value of Order 2 is changed to **No**.

### Planning Results When One Order Is Decommitted

Order 2 was decommitted and the plan was run. Our table now displays new planned dates.

<table>
<thead>
<tr>
<th>Order Number</th>
<th>Calculated Priority</th>
<th>Requested Date</th>
<th>Requested Quantity</th>
<th>Scheduled Date</th>
<th>Planned Date</th>
<th>Enforce Current Commit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order 1</td>
<td>10</td>
<td>01/04/2020</td>
<td>15</td>
<td>01/11/2020</td>
<td>01/11/2020</td>
<td>Yes</td>
</tr>
<tr>
<td>Order 2</td>
<td>20</td>
<td>01/06/2020</td>
<td>10</td>
<td>01/18/2020</td>
<td>01/25/2020</td>
<td>No</td>
</tr>
<tr>
<td>Order 3</td>
<td>30</td>
<td>01/12/2020</td>
<td>5</td>
<td>01/25/2020</td>
<td>01/25/2020</td>
<td>Yes</td>
</tr>
</tbody>
</table>

You infer that the planned date of Order 2 is later than its scheduled date. Meanwhile, the planned date of Order 3 has improved. This is because the planning process used supply for the decommitted Order 2, which would be available from 01/18, to fulfill Order 3 on 01/18, which is earlier than its scheduled date.

Because 5 units of supply were taken away from Order 2, and because the next 5 units of supply are available on only 01/25, Order 2 can be fulfilled only on 01/25.
Example of How Preventing An Order's Improvement Impacts Planning Results

Let's say you're planning three orders for the same item, sourced from the same organization. Let's chart out the sales order attributes that are relevant before and after planning. We will review two planning scenarios: in the first, the Pull-in Enabled value is Yes for all three orders, and in the second, we prevent one order from being considered for improvement.

This table depicts the attribute values relevant for planning.

<table>
<thead>
<tr>
<th>Order Number</th>
<th>Requested Date</th>
<th>Requested Quantity</th>
<th>Scheduled Date</th>
<th>Pull-in Enabled</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order 1</td>
<td>01/04/2020</td>
<td>10</td>
<td>01/15/2020</td>
<td>Yes</td>
</tr>
<tr>
<td>Order 2</td>
<td>01/06/2020</td>
<td>4</td>
<td>01/15/2020</td>
<td>Yes</td>
</tr>
<tr>
<td>Order 3</td>
<td>01/12/2020</td>
<td>6</td>
<td>01/15/2020</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Supply Availability Information
- 10 units on 01/11/2020
- 10 units on 01/15/2020

Key Settings for the Plan Run
- We select a simple demand priority rule REQDATE, which prioritizes demands by just by their requested date. It gives highest priority to the order with the earliest requested date.
- The Pull-in Enabled value is Yes for all three orders.

Planning Results When All Orders Are Considered for Improvement

The plan was run. Our table now also includes calculated priority values and planned dates.

<table>
<thead>
<tr>
<th>Order Number</th>
<th>Calculated Priority</th>
<th>Requested Date</th>
<th>Requested Quantity</th>
<th>Scheduled Date</th>
<th>Planned Date</th>
<th>Pull-in Enabled</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order 1</td>
<td>10</td>
<td>01/04/2020</td>
<td>10</td>
<td>01/15/2020</td>
<td>01/11/2020</td>
<td>Yes</td>
</tr>
<tr>
<td>Order 2</td>
<td>20</td>
<td>01/06/2020</td>
<td>4</td>
<td>01/15/2020</td>
<td>01/15/2020</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Orders are prioritized based on their requested date. You infer Order 1 has been improved beyond its scheduled date. This is because 10 units of supply were available on 01/11 to satisfy the request from Order 1. Another 10 units of supply were available on 01/15, of which 4 units can be allocated to Order 2 and 6 units to Order 3, as requested.

Now let's see what happens when the Pull-in Enabled value of Order 1 is changed to No.

Planning Results When One Order Isn't Considered for Improvement

The plan was run and Order 1 wasn't considered for improvement. Our table now displays new planned dates.

You infer that the planned date of Order 1 is the same as its scheduled date. This is because it wasn't considered for improvement. The supply of 10 units available on 01/11 can now be used to fulfill the demand of Orders 2 and 3, for which 4 and 6 units were requested, and so their planned dates improve beyond their scheduled date. The 10 units of supply are available on 01/15, and this supply is used to fulfill Order 1.

When to Lock or Override Planning Results

During a plan run, orders are prioritized based on the demand priority rule, and supply is allocated accordingly. You might want to ship or deliver critical orders by a particular date, and your plan run may yield desirable or undesirable Planned dates for those orders. Here's what you can do in each case:

- If the Planned values are satisfactory, you can use the Lock Planning Results action to freeze the Planned values. This ensures that the Planned values for this order line are retained when you rerun the plan.
• If the Planned values are unsatisfactory, you can use the **Override Planning Result** action to manually specify Planned values for this line.

### How You Review Sets and Resolve Item Constraints

Order lines may be grouped into shipment sets or arrival sets, but if one item in a set is more constrained than others, it can delay the fulfillment of the set. This is because the planned date on the most delayed order line comes the planned date for the entire set.

#### Review A Set

To review the set that an order belongs to, select the order and click the Manage Set action. Here’s how you understand the constraints:

- Compare the Planned Date and Item Availability Date values to know if an item will be available in time. The planned date for a set depends on the latest item availability date.
- Click the **View Constraints** button for a graphical depiction of constraining items.
- Review the **Constraint Rank** values to know which items are more constraining.
- Review the **Planned Date Without Item** values to know what the set’s planned date is if certain constraining items are removed from the set.
- Review the **Improvement Potential Without Item in Days** values to know how much the planned date improves if certain constraining items are removed from the set.

#### Resolve Item Constraints

To improve the fulfillment prospects of a set, you can remove constraining items in the set using the **Remove from Set** action. The items then become standalone lines within your saved search, but you can also view them on the Manage Set page by clicking the **View All Lines** action. You can undo removals using the **Add Back to Set** action.

*Note:* You can’t remove an order line from a set that’s sourced from Oracle Fusion Order Management. The **Remove from Set** action is grayed out for such sets.

### Example of How You Resolve Item Constraints Within A Set

After a plan run, let's assume you want to manage the fulfillment of the set BLM_SHIP_SET that contains 10 order lines, three of which constrain the set. This means that the item availability dates for these three lines falls after the requested date. Let’s use a table to chart out the relevant attribute values for these three lines from the Manage Set page:

<table>
<thead>
<tr>
<th>Order Line Number</th>
<th>Item</th>
<th>Requested Date</th>
<th>Item Availability Date</th>
<th>Planned Date</th>
<th>Constraint Rank</th>
<th>Planned Date Without Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line 3</td>
<td>Item 3</td>
<td>01/15/2020</td>
<td>01/25/2020</td>
<td>01/25/2020</td>
<td>1</td>
<td>01/22/2020</td>
</tr>
<tr>
<td>Order Line Number</td>
<td>Item</td>
<td>Requested Date</td>
<td>Item Availability Date</td>
<td>Planned Date</td>
<td>Constraint Rank</td>
<td>Planned Date Without Item</td>
</tr>
<tr>
<td>-------------------</td>
<td>--------</td>
<td>----------------</td>
<td>------------------------</td>
<td>--------------</td>
<td>----------------</td>
<td>--------------------------</td>
</tr>
<tr>
<td>Line 1</td>
<td>Item 1</td>
<td>01/15/2020</td>
<td>01/22/2020</td>
<td>01/25/2020</td>
<td>2</td>
<td>01/19/2020</td>
</tr>
<tr>
<td>Line 2</td>
<td>Item 2</td>
<td>01/15/2020</td>
<td>01/19/2020</td>
<td>01/25/2020</td>
<td>3</td>
<td>01/15/2020</td>
</tr>
</tbody>
</table>

**Inferences**

- The most constraining line is Line 3, because Item 3 has the latest item availability date. Because the planned date of a set is the planned date of its most constrained line, the planned date for this set is 01/25/2020. If you remove Line 3 from the set, the planned date for the set becomes 01/22.
- If you remove just Line 1 and Line 2, the planned date will still be 01/25/2020, because the most constraining line, Line 3, is still in the set.
- If you want the set planned on time, you must remove not only Line 2, but also Line 1 and Line 3.
5 Demand Priority Rules

Overview of Demand Priority Rules

Use demand priority rules to define how orders are prioritized for fulfillment.

A demand priority rule is made up of uniquely ranked demand priority attributes. Demand priority attributes are the various considerations that impact fulfillment, like dates, lead times, customers, and items. You apply one demand priority rule while running the backlog plan, and review the demand fulfillment priorities determined by that plan run. You can specify how demand attributes should be considered when your orders are being prioritized during backlog planning. To review multiple fulfillment options, you can rerun the plan as many times as you want using a different demand priority rule each time.

To manage your demand priority rules in the Backlog Management work area, open the Tasks panel and click the Manage Demand Priority Rules link.

Define a Demand Priority Rule

Here’s how you define a demand priority rule:

1. Go the Backlog Management work area.
2. Open the Tasks panel and select the Manage Demand Priority Rules link.
3. On the Manage Demand Priority Rules page, in the Search Results section, click the Create icon, the Duplicate icon, or the Edit icon.
4. Provide a name for your demand priority rule. You can also provide a description for it.
5. In the Attribute column, select a demand priority attribute. You can add as many attributes as you want.
6. In the Sort Order column specify the order in which values for this attribute will be prioritized.
7. Review the attribute ranking. You can change it by clicking on an attribute row and then using the Move buttons to move the attribute up or down in the list.
8. Save your demand priority rule.

Tip: If you need a rule that’s similar to an existing rule, then consider duplicating the existing rule. When you duplicate an existing rule, say Rule XY_Z, the duplicate rule’s name defaults to Copy of Rule XY_Z, but you can change it.

How User-Defined Demand Priority Attributes Are Added

The set of demand priority attributes includes predefined attributes and attributes added by your enterprise, referred to as user-defined attributes. User-defined attributes are added as flexfields from the Setup and Maintenance work area. These attributes are supported for externally sourced sales order demands only, and not for demands sourced from Oracle Fusion Order Management.

Related Topics

- Overview of Flexfields
How Demand Priority Is Calculated Using Demand Priority Rules

On the Backlog Analysis page, you select a demand priority rule and click the Run Plan button. The backlog planning process then calculates fulfillment priorities for the demand lines in the Backlog Analysis table.

Settings That Affect Rule-Based Priority

- The ranking of the demand priority attributes in the rule
- The ranking of attribute values

Let's assume that you selected a rule called REV_REQDATE, which is made up of the attributes Order Revenue and Requested Date. This table shows the attribute and attribute value rankings within the rule:

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Attribute Ranking</th>
<th>Attribute Value Ranking</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order Revenue</td>
<td>1</td>
<td>Larger to Smaller</td>
</tr>
<tr>
<td>Requested Date</td>
<td>2</td>
<td>Earlier to Later</td>
</tr>
</tbody>
</table>

How Demand Priority Is Calculated

When you run the backlog plan, the first tier of prioritization is the attribute's rank, and the second is the ranking of the attribute values. When orders are prioritized based on the first attribute, the second attribute is factored in and the prioritization is refined.

So, using the rule REV_REQDATE, the backlog planning process first considers the orders by revenue, giving high-value orders more priority. Then the process prioritizes orders by their requested dates, and calculates priority values for each order. If the highest order revenue is the same for two orders, then the order with the earlier requested date gets the higher priority value. Priority values are calculated in multiples of 10, and the highest priority value is 10.

Note: You can override a calculated priority value by specifying a different value in the Override Priority column. You must rerun the plan for this override to take effect.

Related Topics

- When to Override Demand Priority
6 Backlog Planning Rules

Overview of Backlog Planning Rules

Use backlog planning rules to control how supply availability is considered during backlog management. You can create, edit, and delete backlog planning rule using the Manage Backlog Planning rules task in the Backlog Management work area. Defining the backlog planning rule involves two tasks: specifying the backlog planning mode, and assigning the backlog planning rule.

Note: Backlog planning rules share data with ATP rules in Oracle Fusion Global Order Promising. So if your enterprise uses Global Order Promising, then changes to a backlog planning rule may impact the corresponding ATP rule.

Backlog Planning Mode Selection

The backlog planning mode determines which supply and demand attributes are evaluated when supply availability is being considered. You pick a planning mode depending on the nature of your supply, your preferred supply and demand source types, and a variety of time constraints. To do so, use the Backlog Planning Mode tab. There are three backlog planning modes:

- **Supply Chain Availability Search mode**: You use this mode when your supply is for items that are of high value or highly constrained.
- **Lead Time Based mode**: You use this mode when your supply is for items that are made-to-order.
- **Infinite Availability Based mode**: You use this mode when your supply is for items that are easily available or of low value.

To know more about these modes, refer to the Backlog Planning Modes topic.

Backlog Planning Rule Assignment

You can control supply availability for an item, for a category of items, for all items in an organization, or for a specific item from an organization, by associating them with backlog planning rules. To do so, use the Backlog Planning Rule Assignment tab. Remember that for an item to be used in the planning process, it must be assigned to backlog planning rule.

Because there are four assignment bases, multiple backlog planning rules can be applicable to an item. But the granularity of the assignment bases determine which rule is used for the item. To know more, refer to the Backlog Planning Rule Precedence topic.

Backlog Planning Modes

Specify a backlog planning mode to control which supply and demand attributes are evaluated when supply availability is being considered. There are three modes:

- the Infinite Availability Based mode
• the Lead Time Based mode
• the Supply Chain Availability Search mode

Infinite Availability Based mode
You use this mode when your supply is for items that are easily available or of low value. Here are the attribute considerations in this planning mode:
  • The item is planned on the requested date irrespective of availability.
  • No availability search is performed.
  • Calendars are respected during planning.
  • The backlog planning engine doesn't generate any pegging.
  • Transit time constraints are respected; therefore, requests within transit lead times are planned after accounting for the transit lead time. No other attributes are associated with this mode.

Lead Time Based mode
You use this mode when your supply is for items that are made-to-order. Here are the main attribute considerations of this planning mode:
  • Orders are planned after a specified lead time, as planned dates are always offset from the requested date by the specified lead time.
  • No supply availability search is performed.
  • Lead time can be specified in multiple ways.
  • The backlog planning engine doesn't generate any pegging.
  • Calendars and transit time constraints are respected.

When you create backlog planning rules in lead time planning mode, you use one of these lead time attributes:
  • Total lead time
  • Cumulative manufacturing lead time
  • Cumulative total lead time
  • User-defined lead time

Supply Chain Availability Search mode
You use this mode when your supply is for items that are of high value or highly constrained. Here are the main features of this planning mode:
  • A detailed availability search is performed across supply chain depending on the options that you select when you create the rule.
  • Pegging information is generated by the engine.
  • Lead times, calendars, capacities, transport modes, and supply chain network are considered during planning.

When you create backlog planning rules in supply chain availability search mode, you make specifications to control several aspects of the search. Here’s what you specify:
  • Whether the process must search components and resources
  • Whether it must respect allocation constraints
• Which types of supply and demand it must consider
• Which lead time it uses for the infinite availability fence
• The time fence for considering past-due demand and past-due supply

Backlog Planning Rule Precedence

You can control supply availability for an item, for a category of items, for all items in an organization, or for a specific item from an organization. Because of these many assignment bases, multiple backlog planning rules can be applicable to an item, but only one rule is finally applied. This is determined by the granularity of the assignment bases associated with the item.

Here’s the backlog planning rule override sequence in the order of most specific assignment to least specific assignment:

• Item and Organization
• Item
• Category
• Organization

So if you assign backlog planning rules to the item and to its category, the rule assigned to the item overrides the rule assigned to the category. The planning process then uses the rule assigned to the item while considering supply.

How Supply is Considered in the Infinite Availability Based Mode

When applying a backlog planning rule in the infinite availability based mode, the planning process bypasses supply consideration and determines the planned date from the requested date. Because supply is assumed to be infinite for all days, a request is always planned on the requested date, except in cases where transit lead times are violated.

Settings That Affect the Infinite Availability Based Mode

The type of the requested date impacts the infinite availability mode. If the request type specified by the customer was Shipment, then the requested date is the requested ship date. If the request type specified by the customer was Arrival, then the requested date is the requested arrival date.
How Supply Is Considered

The backlog planning process assumes infinite availability on all days, so no supply and demand matching is done for infinite planning. However, the process must still respect certain constraints for the organization when determining the planned date from the requested date.

- If the requested date is the requested arrival date, the process respects calendar constraints and transit lead time constraints.
- If the requested date is the requested ship date, the process respects calendar constraints.

How Supply Is Considered in the Lead Time Based Mode

In the lead time based mode, the planned date is delayed from the requested date based on the lead time defined in the rule being applied.

Settings That Affect the Lead Time Based Mode

- Type of lead time. It can be the total lead time, the cumulative manufacturing lead time, the cumulative total lead time, or a user-defined lead time.
- Type of requested date. If the request type specified by the customer was Shipment, then the requested date is the requested ship date. If the request type specified by the customer was Arrival, then the requested date is the requested arrival date.

How Supply Is Considered

If the requested date is a ship date, then the backlog planning process applies the lead time offset defined in the backlog planning rule and plans using the requested date plus lead time offset after inflating the calendar date to account for any holidays. The process doesn't check whether there is availability of the item because even if there is availability of the item, the availability must be ignored.

If the requested date is an arrival date, the backlog planning process first derives the requested ship date by applying a transit time offset to determine the requested ship date. To determine the offset, the default carrier, shipping mode, and service level associated between the ship-from date and the ship-to date is considered. To derive the planned ship date, the process then applies the lead time defined in the backlog planning rule to the derived requested ship date. Then to calculate the planned arrival date, the process applies the transit time for the specified or default ship method. When determining dates, the process accounts for any calendar constraints.

The planned date is offset from the requested date based on the lead time defined in the backlog planning rule.
How Supply Is Considered in the Supply Chain Availability Search Mode

The results of the supply chain availability search are affected by a number of settings.

Settings That Affect the Supply Chain Availability Search Mode

The behavior of the supply availability search is primarily determined by four factors:

- Constraints specified on the fulfillment line, such as the specification of a ship-from warehouse and whether splits are allowed.
- Attribute settings for the rule that's being applied.
- The supply chain defined by the assignment set in use and the sourcing rules that it contains.

Additional settings determine other significant considerations. The following must be true for the supply chain availability search to consider capable-to-make when determining availability:

- The item is built from components, and the rule has been enabled to search for components and resources.
- Inventory is maintained at the component level.
- Modeling of bills-of-material and routings have been collected into the planning data repository from the applicable fulfillment systems.

How Supply Is Considered

If the fulfillment line has many constraints specified, such as Substitutions Not Allowed, the nature of the alternative options generated by the supply chain availability search changes. In the most constrained case, when a ship-from warehouse is specified and substitution and splits aren't allowed, planning options are generated from only the specified ship-from warehouse for the specified item, possibly by considering different shipping methods that deliver the item to the customer site.

The fewer constraints specified on the fulfillment line, the more possibilities the supply chain availability search can consider. For example, if a ship-from warehouse isn't specified, and splits and item substitutions are allowed, the supply chain availability search looks for the best possible ways of planning the fulfillment line by looking across all warehouses specified in the applicable sourcing rules and by considering splitting by date, or substituting items, or both. The backlog planning process determines a default availability option as well as availability options that represent the best possible availability from each warehouse.

Unless the constraints on the fulfillment line restrict it from doing so, the supply chain availability search always considers the supply for the item at other warehouses, also known as transfer capable-to-plan, and the supply for the item at suppliers, also known as buy capable-to-plan. If the rule being applied has enabled the consideration of components and resources, the supply chain availability search considers the availability of the components and resources consumed during manufacturing, also known as make capable-to-plan. For example, if the settings enable a capable-to-plan search, and an end item is made of two components, C1 and C2, which are assembled on a resource R1,
if supply is available for the components, but not for the end time, the fulfillment line is planned by using the available supply of the components and by considering the resource availability.

Two more cost attributes are factored in for make capable-to-plan:

- The cost associated with resource consumption defined as cost per unit of resource consumed
- The cost of the components required to make the end item

Supply Chain Availability Search Options

While defining a backlog planning rule in the supply chain availability search mode, you specify some planning attribute values. These planning attributes influence how the backlog planning process will determine fulfillment options and fulfillment option priority when applying the rule to determine planning results.

Search Components and Resources

This defines whether the backlog planning process will search components and resources to find backlog planning options that include making the item. Select the **Search components and resources** check box to let the backlog planning process consider whether the end item can be made using its component and resources if an item isn’t available at a requested location. When the planning process is applying a backlog planning rule with search components and resources enabled, the process can determine planning results by looking into the availability of the components and resources required to make the item being planned. In make-to-order environments, inventory is often not available for the ordered item, so it’s necessary for the planning process to look at components and resources to plan the order. The process respects all relevant calendars, lead times, and capacities when searching components and resources.

Truncate Order Fulfillment Quantity to Nearest Integer Attribute

Defines whether the backlog planning process will truncate the value of the order fulfillment quantity to the nearest integer when splits are allowed in the fulfillment line. Select the **Truncate order fulfillment quantity to nearest integer** check box to let the backlog planning process truncate the value of the order fulfillment quantity to the nearest integer when splits are allowed in the fulfillment line. Selecting this attribute will ensure that the split quantities are in integer values of the ordered units of measure (UOM), and the planning process never splits the fulfillment quantity into a decimal value because of factors like the availability of fractional components for building the supply on time, and UOM conversion.

Infinite Availability Time Fence

The backlog planning process assumes infinite supply availability after the time period defined by the infinite availability fence. For requested dates after the time fence, the process plans on the requested date without checking availability. If the requested date is beyond the infinite time fence, no real supplies are used for planning. For requested dates within the infinite availability time fence, the backlog planning process conducts a supply chain availability search.

Select one of these lead times to define a lead time based infinite availability time fence:

- Total lead time
- Cumulative manufacturing lead time
- Cumulative total lead time
User-defined lead time

Note: You should define an infinite availability time fence. If you don't define an infinite availability time fence, the backlog planning process uses the horizon of a year, which incurs a large increase in the memory used by backlog planning engine.

Past-Due Demand Considered
Past-due demand is a demand with a scheduled date earlier than the current date. Most past-due demands need to be considered and accounted for as they're expected to ship in the future. However, you may have a number of days of past-due beyond which you no longer consider the demand valid. You specify the number of days of past-due for past-due demand to be included when the planning process determines planning results. The process doesn't consider any past-due demand due before the number of days you specify. If you don't specify a value for past-due demand considered, all demands with scheduled date earlier than the horizon start date will be ignored.

Past-Due Supply Considered
Past-due supply is a supply, usually in the form of a purchase order, for which the expected date is earlier than the current date. Most past-due supplies need to be considered as the expectation of supply is still considered valid. You specify the number of days of past-due supply to be included when the planning process determines planning results. The process doesn't consider any past-due supply expected before the number of days you specify. If you don't specify a value for past-due supply considered, all supplies earlier than the horizon start date will be ignored.
7 Sourcing Rules, Bills of Distribution, and Assignment Sets

Sourcing Rules and Bills of Distribution in Backlog Management

To define the sources of supply for your supply chains and to define your date-effective sourcing strategies, create sourcing rules and bills of distribution in the Backlog Management work area. Within each sourcing rule or bill of distribution, you define one or more supply sources and a combination of rankings and quantity-based sourcing specifications for each source to define priorities across the supply sources. For each source, you also select one of three source types, and you specify the value for the attributes applicable to the selected source type.

This table lists the three replenishment source types, the definition of the source type, and the attributes to specify for each source type.

<table>
<thead>
<tr>
<th>Source Type</th>
<th>Source Type Definition</th>
<th>Attributes to Specify</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buy from</td>
<td>Sourced from an external supplier.</td>
<td>Specify the supplier and supplier site.</td>
</tr>
<tr>
<td>Make at</td>
<td>Sourced from an internal organization that manufactures the item.</td>
<td>Specify the manufacturing organization.</td>
</tr>
<tr>
<td>Transfer from</td>
<td>Sourced through an interorganization transfer.</td>
<td>Specify the organization from which items will be transferred.</td>
</tr>
</tbody>
</table>

Note: When you create sourcing rules and bills of distribution, you specify how you will replenish items. You don’t specify what items that you will replenish. To specify which sourcing rules or bills of distribution that you will use to replenish what items, you create assignment sets.

You define the following aspects of sourcing rules and bills of distribution to define your sources of supply and your sourcing strategies:

- Global sourcing rules
- Local sourcing rules
- Bills of distribution
- Effectivity dates
- Source ranks, quantity-based sourcing specifications, and allocation percentages

Tip: When first designing your sourcing rules and bills of distribution, start by envisioning your assignment set. Determine what set of global sourcing rules, local sourcing rules, bills of distribution, or combinations of rules and bills that you need to implement your assignment set while minimizing the number of rules or bills to maintain. For example, you may be able to define a global sourcing rule in such a way that you will need only a few local sourcing rules to assign for exceptions to the global rule.
Global Sourcing Rules

Global sourcing rules can specify two of the source types: the buy-from or transfer-from source types. Any organization can potentially replenish items by buying from any of the suppliers specified in the buy-from sources, or transferring from any of the organizations specified in the transfer-from sources. For example, if you create a global sourcing rule with a buy-from source with Super Supply Company specified for the supplier, any of your organizations can potentially buy from Super Supply Company.

If you have a source that's applicable to most of your organizations, create a global sourcing rule for that source and local sourcing rules for the organizations for which the source isn't applicable. For example, if there are 20 organizations in your company, and 19 of the organizations transfer supply from the Munich organization, create a global sourcing rule specifying transfer-from the Munich organization, and create a local sourcing rule specifying where the Munich organization gets supply from.

Local Sourcing Rules

Local sourcing rules can specify all three source types. Because a local sourcing rule is applicable to one, and only one, organization, you specify which organization the rule is being created for when you create the rule. The replenishment sources defined in the rule are applicable only to the organization for which the rule was created. For example, if you create a local sourcing rule with M1 as the organization for which the rule is being created, and you add a buy-from source to the rule with XYZ Supply Company specified for the supplier, and you have no other sourcing rules or bills of distribution with XYZ Company specified for the supplier, then only the M1 organization can buy from XYZ Supply Company.

Bills of Distribution

If you have designed multiple local sourcing rules with material flowing through three or more organizations, you can choose to create one bill of distribution to implement the sources instead of creating multiple local sourcing rules. Choosing to create a bill of distribution instead of sourcing rules is a personal or organizational preference. Any scenario that you can implement by creating a bill of distribution, you can also implement by creating multiple local sourcing rules.

For example, the following sourcing scenario could be implemented by three local sourcing rules or one bill of distribution:

- Organization M1 sources items by purchasing from a supplier, XYZ Supply.
- Organization M2 sources items by transferring from M1.
- Organization M3 sources items by transferring from M2.

Effectivity Dates

Use sourcing effectivity dates to modify sourcing rules and bills of distribution when sources change, such as a new supplier contract is established or a manufacturing facility is shut down. Each rule or bill can have multiple, non-overlapping ranges of effectivity start dates and end dates, with a different set of sources specified for each range. For example, if you have a sourcing rule that currently specifies a buy-from source with Acme Supplier specified for the supplier, but your company has decided to start buying from Winter Widgets instead, you would modify the sourcing rule by specifying the applicable end date, the date you will no longer buy from Acme Supplier, for the current effectivity date range. You add a new effectivity date range, specifying the date when you will start buying from Winter Widgets for the start date, and then you add a buy-from source for the new effectivity date range with Winter Widgets specified for the supplier.
Source Ranks, Quantity-Based Sourcing Specifications, and Allocation Percentages

For each source in a sourcing rule or bill of distribution, you designate a rank to specify the order in which the sources within the rule or bill will be considered by the backlog planning process when the rule or bill is applied during a supply chain availability search. The source with the lowest number rank will be considered first, and the source with the highest number rank will be considered last. If your sourcing strategy includes using specific sources for specific quantities, you designate a from quantity, a less-than quantity, or both, for one or more sources.

**Note:** Because sourcing rules collected from some source systems might include split allocations for planning purposes, multiple sources that include the same rank and quantity range might exist, but the allocation percentages must add up to 100 percent. The backlog planning process doesn't split the quantity when it determines availability.

The backlog planning process checks the source with the highest allocation percent first within a group of sources with the same rank. If the source with the highest allocation percent has enough supply, that source is used for the entire requested quantity. If the source with the highest allocation percent doesn't have enough supply, then the source with the next highest allocation percent will be checked for the entire quantity. Because split allocations aren't applicable to backlog management sourcing strategies, the examples provided here don't include split allocations.

The following table is an example of a sourcing rule with three ranks. Quantity-based sourcing isn't being used in this example. If a supply chain search is conducted using this rule, the backlog planning process checks if organization M2 can make the desired quantity first. If organization M2 can't make the desired quantity, the backlog planning process will then check if there is enough quantity at organization V1 for an interorganization transfer. If there isn't enough quantity at organization V1, then the backlog planning process will check if the desired quantity can be bought from supplier Winter Widgets.

<table>
<thead>
<tr>
<th>Replenishment Source and Applicable Attribute Value</th>
<th>Rank</th>
<th>Allocation Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make at manufacturing organization M2</td>
<td>1</td>
<td>100</td>
</tr>
<tr>
<td>Transfer from organization V1</td>
<td>2</td>
<td>100</td>
</tr>
<tr>
<td>Buy from supplier Winter Widgets</td>
<td>3</td>
<td>100</td>
</tr>
</tbody>
</table>

How Assignment Set Hierarchy Determines Which Sourcing Rule Is Used in Backlog Management

The sourcing assignment levels that you select when you create sourcing assignments in an assignment set formulate a sourcing hierarchy for that assignment set. The backlog planning process uses the sourcing hierarchy to determine which sourcing rule or bill of distribution to follow to find a source for a specific item. It always uses the most specific sourcing rule or bill of distribution that's applicable in the hierarchy.
Note: When the planning process conducts a supply chain search, a profile option, the Default Order Promising Assignment Set profile option, designates which assignment set will be applied. The planning process uses the sourcing hierarchy to determine which sourcing rule or bill of distribution to follow from the rules or bills within the designated assignment set.

Settings That Affect the Sourcing Hierarchy

The position of a sourcing rule or a bill of distribution in the sourcing hierarchy is determined by these two factors:

- The assignment level at which you assigned the sourcing rule or bill of distribution to the assignment set.
- The rule or bill type which can be global sourcing rule, local sourcing rule, bill of distribution, or source organization. Source organization is the type used to designate when the set of item attribute values is what determines the source instead of a sourcing rule or bill of distribution.

Tip: Understanding and using the power of the sourcing hierarchy in an assignment set can make the designing and managing of sourcing relationships easier.

For example, if a plant initially receives all items belonging to a specific item category, such as the Fasteners item category, from Supplier A, then the sourcing rule to buy from Supplier A can be assigned at the Category assignment level for the Fastener item category.

If you then determine that a specific fastener is to be sourced from a different supplier, Supplier B for example, then you can assign a different sourcing rule to buy from Supplier B at the item level for the specific fastener. The detailed-to-general hierarchy determines that the specific fastener will be sourced from Supplier B, while all other fasteners are still sourced from Supplier A.

How the Sourcing Hierarchy Determines Which Rule Is Used

The sourcing hierarchy can be envisioned as a detailed-to-general table where each row in the table is a combination of assignment level and rule type. The first row, the row where a sourcing rule is assigned at the item and customer and customer site assignment level, is the most specific row. The last row, the row where a global sourcing rule is assigned at the global assignment level, is the most general row. You use the sourcing hierarchy to answer which sourcing rule, bill of distribution, or set of item attribute values will be used to find a source for a specific combination of values of these four criteria:

- Assignment set
- Date
- Organization
- Item

For the sourcing rules and bills of distribution within the assignment set where the effective date of the sourcing assignment meets the date criteria, each rule or bill is associated with a specific row in the sourcing hierarchy. The sourcing assignment attribute values, such as the item value, determine which of the rules, bills, and set of item attributes are applicable to the specific criteria set. Multiple rules, bills, or item attributes can be applicable; therefore, multiple rows can be applicable. The rule, bill, or set of item attributes associated with the highest row in the hierarchy is the rule, bill, or set of item attributes that will be followed to determine the source.

From the Manage Assignment Sets page, you can click the View Sourcing Hierarchy button to view a table containing rows of the sourcing hierarchy.
This table lists the sourcing hierarchy. The most specific, most granular, row is the first row. The least specific, least granular row, is the last row.

<table>
<thead>
<tr>
<th>Assignment Level</th>
<th>Sourcing Rule Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item and organization</td>
<td>Sourcing rule</td>
</tr>
<tr>
<td>Item and organization</td>
<td>Source Organization</td>
</tr>
<tr>
<td>Category and organization</td>
<td>Sourcing Rule</td>
</tr>
<tr>
<td>Item</td>
<td>Bill of Distribution</td>
</tr>
<tr>
<td>Item</td>
<td>Sourcing rule</td>
</tr>
<tr>
<td>Category</td>
<td>Bill of Distribution</td>
</tr>
<tr>
<td>Category</td>
<td>Sourcing Rule</td>
</tr>
<tr>
<td>Organization</td>
<td>Sourcing Rule</td>
</tr>
<tr>
<td>Organization</td>
<td>Source Organization</td>
</tr>
<tr>
<td>Global</td>
<td>Bill of Distribution</td>
</tr>
<tr>
<td>Global</td>
<td>Sourcing rule</td>
</tr>
</tbody>
</table>

**Tip:** You can view the sourcing hierarchy and initiate a search to ask "Where does this organization get this item on this date?" If you need to analyze why the process returned results that were different than what you expected, you can view and search the sourcing hierarchy to determine which sourcing rule would be used for your set of criteria.

### How Assignment Sets, Sourcing Rules, and Bills of Distribution Work Together in Backlog Management

You create *assignment sets* in the Backlog Management work area to implement the supply chain networks for your sourcing strategies. You implement your supply chain network by selecting the appropriate *sourcing assignment level* when you assign a *sourcing rule* or *bill of distribution* to an assignment set. You create alternative assignment sets, with different sourcing assignments, to model alternative supply chains.
The following figure shows an example where three sourcing rules and one bill of distribution are assigned to two assignment sets:

- The first sourcing rule, SR1, is assigned to the first assignment set, AS1, at the item and organization assignment level for item B241 and organization M1.
- The bill of distribution, BD1, is assigned to the first assignment set, AS1, at the item assignment level for item C105.
- The second sourcing rule, SR2, is assigned to the first assignment set, AS1, at the organization assignment level for organization M2.
- The second sourcing rule, SR2, is also assigned to the second assignment set, AS2, but is assigned to AS2 at the item assignment level for item C105.
- The third sourcing rule, SR3, is assigned to the second assignment set AS2, at the organization assignment level for organization M2.

When the supply chain network implemented by assignment set AS2 is followed, Item C105 is replenished according to the sourcing means specified in the sourcing rule SR2. When the supply chain network implemented by assignment set AS1 is followed, Item C105 is replenished according to the sourcing means specified in the bill of distribution BD1.

**Assigning Sourcing Rules or Bills of Distribution to Assignment Sets**

When you create sourcing rules and bills of distribution in the Backlog Management work area, you create descriptions of the means by which you replenish items, but you don’t associate these means with any specific items. You create assignment sets to define your supply chain sourcing and transfer links by assigning sourcing rules and bills of distribution to specific items, customers, organizations, categories, demand classes, or regions. For each sourcing assignment within an assignment set, you select the applicable sourcing assignment level to implement the scope of the sourcing rule or bill of distribution for the specific sourcing assignment.

When you add new replenishment sources, change your strategies for using your existing sources, or you delete replenishment sources, you edit existing assignment sets, or create assignment sets, to incorporate these changes into your supply chains. When you edit assignment sets, you add new sourcing assignments to the assignment set, delete existing sourcing assignments from the assignment set, or make changes to the assignment level and assignment...
attributes for existing sourcing assignments. You edit assignment sets on the Edit Assignment Set page, or in a worksheet by selecting to edit in worksheet while on the Manage Assignment Sets or Edit Assignment Set pages.

Specify Catalogs for Assignment Sets

A catalog is a collection of categories used to classify items that you can organize into a hierarchy. A catalog can have a flat or single-level structure of categories or you can have a hierarchical structure of categories.

When creating assignment sets, you must specify a catalog for each assignment set. You associate an assignment set with a catalog to:

- Use the categories associated to that catalog in your assignment set.
- Link the sourcing assignments to the categories associated with the catalog.

If you do not specify a catalog for an assignment set, the assignment set uses the Catalog for Sourcing Assignments (MSC_SRC_ASSIGNMENT_CATALOG) profile option as the default catalog.

To create an assignment set and specify a catalog, use the Manage Assignment Sets task in one of the Supply Chain Planning work areas.

Note: Assignment sets are not applicable to the Demand Management work area.

How You Edit a Backlog Planning Assignment Set Within a Spreadsheet

When managing or editing assignment sets, you use the Edit in Spreadsheet button on the Manage Assignments Sets page in the Order Promising work area to use a spreadsheet to add, edit, or delete the sourcing rule or bill of distribution assignments for an assignment set. If you’re managing assignment sets, you must select an assignment set before you can choose to edit in spreadsheet.

Related Topics

- Guidelines for Using Desktop Integrated Excel Workbooks
8 Supply Network Model

How You Maintain Your Network Supply Model for Backlog Management

Use the Maintain Supply Network Model page to view your collected data that includes details of organization, customers, suppliers, carriers, and interlocation shipping networks. To access the Maintain Network Model page, navigate to a Supply Chain Planning work area. Click the Tasks panel tab and then select the Maintain Supply Network Model link.

You use organizations to represent your business facilities or functions. Typically, if your business has a single physical facility that performs two different functions, then you model it as two organizations. For example, you have one facility that’s a manufacturing plant and a distribution center. You can model them as two separate organizations. Additionally, if your business has one function located in two separate physical facilities, you can model those as one organization. If you modeled your facilities as one organization, you can create separate subinventories to represent inventory for each facility.

Review the Collected Data

Based on your search results, use the information on the Organization tab to do the following:

- Review organizations, including the time zones associated with the organizations, for all source systems.
- Select the drop ship validation organization. For each source system, you can select only one organization as the drop ship validation organization. You can also assign a calendar to a drop shop validation organization.

Use the Customer and Supplier tabs to review collected data and assign time zones to customer sites and supplier sites. If the customer site or supplier site doesn’t have an associated time zone, then the customer site or supplier site is assumed to be in the same time zone as the organization that’s associated to the demand or supply.

Use the Carrier and Interlocation Shipping Locations tabs to review collected data on carriers, shipping methods, and transit times.

Associate Calendars with Supplier Sites

Use a supplier site calendar to measure processing lead times for purchases from a supplier site. You can associate a Supply Chain Planning calendar with a supplier site to use for all items sourced from that supplier site. The calendar is in the collected planning data.

You can associate a calendar with supplier sites to use if there is no calendar defined through the Approved Supplier List upload for a supplier site-item combination. From a Supply Chain Planning work area, navigate to the Maintain Supply Network Model page, Suppliers tab. In the Supplier Site Calendar column for a supplier, select a calendar name from the list of collected calendars. You can only edit this field if the supplier row contains a supplier site.

When you run the plan, the planning process uses the selected calendar on the Maintain Supply Network Model page if the approved supplier list calendar for the supplier site-item is blank. If the approved supplier list calendar for the
supplier site-item is blank, and you do not associate a calendar with a supplier site on the Maintain Supply Network Model page, then the planning process uses the 24/7 calendar.

How You Define the Approved Supplier List for Supply Chain Planning

An approved supplier list (ASL) is a repository of information that links items to the suppliers and supplier sites that provide them to either a specific ship-to-organization or the entire enterprise. An ASL can be global or specific to an organization; however, supply planning only recognizes global ASLs. The planning process collects ASLs from Oracle Fusion Procurement to determine the supplier and supplier sites for items.

Define ASL attributes in two different ways to use in supply planning. You can define some attributes in Oracle Fusion Procurement and then upload a CSV file that defines the attributes you want supply planning to use.

Define the following item-to-supplier relationships and order modifiers in Oracle Fusion Procurement:

- Supplier
- Supplier site
- Minimum order quantity
- Fixed lot multiple

To upload additional attributes for supply planning to use, you must create and collect the ASL from purchasing. You can then use the CSV file upload to define additional attributes such as the following:

- Item-supplier lead time
- Supplier capacity calendar
- Daily supplier capacity

Related Topics

- Supplier Capacity Options
- How You Maintain Your Supply Network Model

Drop Shipments

Drop ship is an order fulfillment strategy where the seller does not keep products in inventory. Instead, the seller relies on suppliers or contract manufacturers to build, store, and ship orders to customers. Material flows directly from the supplier to the end customer. In this flow, the shipment is called a drop shipment.

The drop ship flow includes the following steps:

1. A customer places an order for a product.
2. The seller issues a purchase order for the item and provides instructions for shipping directly to the customer.
3. The suppliers or contract manufacturers ship the product.
4. The seller earns a profit.
Set Up a Drop Shipment Validation Organization

The supply planning process uses a special organization called drop shipment organization for drop ship demands and supplies. Use the drop shipment validation organization to get various item organization attributes, such as lead times and time fences for drop ship items. You must specify a drop shipment validation organization for each source system that supports drop shipments. Specify the drop shipment validation organization value on the Manage Organizations page in the Maintain Supply Network Model task.

**Caution:** Supply Planning sources all demands against the drop shipment validation organization with drop shipment planned orders. For this reason, the drop shipment validation organization should not be a standard inventory organization with transactions, as there could be unexpected results.

Use the drop shipment validation organization for the following purposes:

- As the source for organization-item attributes when creating drop shipment planned orders.
- As a proxy for the organization for drop shipment forecasts and manual demands.
- As a proxy for the organization during the collections of drop shipment sales orders and drop shipment history.

Specify the drop shipment validation organization when you generate a forecast or create a manual demand. Drop shipment sales order bookings and shipments history are collected with the drop shipment validation organization when items are shipped from the warehouse. Demand forecasting can create forecasts for the drop shipment validation organization and release the forecasts for planning supplies. The drop shipment validation organization can be the item master for a source system, but it's not required.

The drop ship validation organization can be the item master for a source system, but it's not required.

**Note:** The drop shipment validation organization must be an item organization. When you set up the drop shipment validation organization, if the item master holds any transactions, create a new drop shipment validation organization.

To set up a drop shipment validation organization:

1. Define an item organization in the Product Information Management work area.
2. Enable the new item organization for collection from the Oracle Fusion source system.
3. Run collections to collect organization entities.
4. Perform the following steps in a Supply Chain Planning work area to complete the drop shipment sourcing setup:
   a. Navigate to a Supply Chain Planning work area.
   b. Click the **Tasks** panel tab.
   c. In the Tasks panel, click **Maintain Supply Network Model**.
   d. In the Organizations region, select the **Drop Ship Validation Organization** option.

You have completed the drop shipment validation organization setup.
Set Up Drop Shipment Sourcing Rules

To properly plan for drop shipments, you must first define the drop shipment sourcing rules that determine which supplier sites support drop shipments. These are sourcing rules with a buy from supplier and supplier site source. When defined, you can assign the drop shipment sourcing rule to various aggregate levels of item and customer location. Valid item levels are item and category. Valid customer location levels are customer site, region/zone, and all locations. When you assign a drop shipment sourcing rule, you determine which supplier sites can drop ship to which customer sites.

You can apply drop shipment sourcing rules only to the independent demands. The demand sourcing hierarchy is applied for drop ship cases. If a level 1 rule is found for an item and customer or customer site, then that rule is used. Otherwise, if the highest level rule is assigned to a category-customer level, then that rule is used.

The following table lists the ranking of various demand sourcing hierarchies:

<table>
<thead>
<tr>
<th>Rank</th>
<th>Demand Sourcing Hierarchy</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Item - Customer or Customer Site</td>
</tr>
<tr>
<td>2</td>
<td>Item - Customer</td>
</tr>
<tr>
<td>3</td>
<td>Item-Demand Class</td>
</tr>
<tr>
<td>4</td>
<td>Item - Region</td>
</tr>
<tr>
<td>5</td>
<td>Category - Customer or Customer Site</td>
</tr>
<tr>
<td>6</td>
<td>Category - Customer</td>
</tr>
<tr>
<td>7</td>
<td>Category - Demand Class</td>
</tr>
<tr>
<td>8</td>
<td>Item</td>
</tr>
<tr>
<td>9</td>
<td>Category - Region</td>
</tr>
<tr>
<td>10</td>
<td>Category</td>
</tr>
<tr>
<td>11</td>
<td>Customer or Customer Site</td>
</tr>
<tr>
<td>12</td>
<td>Customer</td>
</tr>
<tr>
<td>13</td>
<td>Demand Class</td>
</tr>
</tbody>
</table>
If an assignment set contains drop shipment rules that are already assigned to an item or a category, then you must define organization-specific rules for an item or category that’s both drop shipped and also shipped to an inventory organization. If the sourcing rule for the drop ship demand includes a transfer from source or a make at, the transfer from source and make at is ignored. If there are multiple buy from sources, then the buy from sources are reapportioned to equal 100%.

Create Drop Shipment Sourcing Rules

To create drop shipment sourcing rules:
1. Define a global sourcing rule and specify a buy from supplier, supplier site, and supplier source system.
2. In the assignment set, assign the global sourcing rule to an assignment level that includes an item or a category. Assign the global sourcing rule to a customer or a zone as required, but you can’t assign the rule to an organization.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Demand Sourcing Hierarchy</th>
</tr>
</thead>
<tbody>
<tr>
<td>14</td>
<td>Region</td>
</tr>
<tr>
<td>15</td>
<td>Global</td>
</tr>
</tbody>
</table>
9 Planning Data Collection

Overview of Data Collections for Supply Chain Planning

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 from one of the Supply Chain Planning work areas:

- 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 may need to manually add these tasks. In the Setup and Maintenance work area, use the following:

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

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

There are two steps involved in the data collection process. The Collect Planning Data process first pulls data from the 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.

Related Topics

- Update Existing Setup Data

Global Entities

Within data collections, Oracle Fusion Supply Chain Planning refers to 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 instances 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

Data Collection Types for Supply Chain Planning

When you collect planning data, one of the parameters you specify for the Collect Planning Data task is the Collection Type parameter. You can select this task from any of your Supply Chain Planning work areas. For the Collection Type parameter, you can select one of the following values:

- Targeted: Choose the Targeted collection type when you want to collect a significant volume of source system data. Typically, you use the Targeted collection type in scenarios such as bulk upload of transaction data, instance upgrade, and change in collection filters.
- Net change: Choose the Net change collection type when you want to collect changed data and new records since the last successful collection cycle.
- Automatic selection: Choose the Automatic collection type when you want the planning process to decide and automatically select an appropriate collection type for each of the entities.
Targeted
You use the Targeted collection type when you want to perform a complete refresh of the data in the data repository. In this mode, the planning process deletes the existing data for the selected entities from the data repository. Next, if subsequently collected from the source, the data for the selected entities replaces the deleted data.

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

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

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

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

In the Setup and Maintenance work area, use the following:

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

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

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

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

## External Source Systems

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

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

### Version External

The version External source system indicates that the source system is not connected to any other Oracle Fusion 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 Import Templates Used to Create CSV Files for Supply Chain Planning topic.

## Organizations Enabled for Data Collections

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

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

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

- Considerations for Enabling Organizations for Data Collections
- Define Flexfield Mappings

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

You perform data collections to populate the planning data repository. In addition to being used by Supply Chain Planning processes, the collected data is used by Oracle 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

- Refresh the Global Order Promising Server

How You Enable Cross-References of Entities by Data Collections

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

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

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

How Planning Processes Collect Different Work Definitions and Item Structures

You may be concerned that the work definition and item structure data in your supply chain planning work area does not match with what was defined in Oracle Manufacturing Cloud. You don’t need to worry. The planning application collects and uses data based on how the work definitions and item structures are defined and associated in the manufacturing source system.

Work Definitions and Item Structures in the Source System

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

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

<table>
<thead>
<tr>
<th>Manufacturing Cloud Definition</th>
<th>Item Structure Name and Work Definition Name in the Planning Data Repository</th>
<th>Planning Collections Processes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Only item structure is defined for an item. No work definition is defined.</td>
<td>Item structure name exists, no work definition name</td>
<td>The planning process collects the item structure information but does not collect information for routing, operations, or item resources. The planning process uses item structure to plan components and does not plan resources.</td>
</tr>
<tr>
<td>Only work definition is defined for an item. No item structure is defined.</td>
<td>Work definition name exists, no item structure name</td>
<td>The planning process collects the work definition information to populate the item structure and routing information. The planning process populates the component information and operation sequence number in the item structure based on the ad hoc components and operation assignment available in the work definition. The planning process uses the work definition information to plan both components and resources.</td>
</tr>
<tr>
<td>Both item structure and work definition are defined for the item.</td>
<td>Both work definition name and item structure name exist</td>
<td>The planning process uses the components that are associated with the work definition to plan. The planning process does not consider any components of item structure that are not associated with the work definition. You can override the item structure component usage within the work definition. The planning process collects component attributes (such as component effectiveness) from the item structure if the components are associated with the work definition. The planning process uses the work definition to plan resources.</td>
</tr>
</tbody>
</table>
Enable External Data Collection for the Oracle Fusion Source System

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

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

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

This table lists the entities for each functional area.

<table>
<thead>
<tr>
<th>Functional Area</th>
<th>Entities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inventory and Materials Management</td>
<td>On-hand Quantity and Transfer Orders</td>
</tr>
<tr>
<td>Procurement</td>
<td>Purchase Orders and Requisitions</td>
</tr>
<tr>
<td>Order Management</td>
<td>Sales Orders and Reservations</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>Work Order Supplies, Resource Availability, Resources, Work Definitions, and Item Structures</td>
</tr>
</tbody>
</table>
Enable External Data Collection

Use these steps to enable external data collection:

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

**Note:** Every time you enable or disable external data collection, you must run a targeted data collection to ensure complete refresh of data in the data repository.

Collect Planning Data from the Oracle Fusion Source System

How You Collect Different Data Types for Supply Chain Planning

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

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

Explanation of Callouts

1. Reference data is primarily sourced from Oracle Fusion 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.

Collection Filters and Collection Templates
You use collection filters and collection templates when you need to collect some common set of entities repeatedly. The collection filters and collection templates are located on the Collect Planning Data page. To open the Collect Planning Data page, click the Collect Planning Data task from one of the Supply Chain Planning work areas.

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

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

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

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

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

When you select a predefined template from the list, the Collection Type field is defaulted to Automatic selection and you cannot edit the field. Also, when you select a predefined template, the Select Collection Filters field is disabled.
You can create a collection template on the Collect Planning Data page by selecting the data collection entities and saving the template for future use. For example, if you frequently collect certain supply planning transactional entities, such as On Hand, Purchase Orders, and Purchase Requisitions, then save these entities as a collection template. It reduces the overhead of selecting the same entities for subsequent collection cycles.

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

**Collect Data Using Targeted Collection Type**

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

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

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

1. Access the Collect Planning Data page from a Supply Planning work area or the Setup and Maintenance work area.
   
   - 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.
   
   - If you are in the Setup and Maintenance work area, then select the following:
     
     - Offering: Supply Chain Planning
     
     - Functional Area: Supply Chain Planning Configuration
     
     - Task: Collect Planning Data

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

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

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

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

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

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

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

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

**On the Supply Planning Data subtab:**

i. Move the required supply entities to the Selected Entities area.

ii. If you collect resource availability, then select a date range type: **Fixed** or **Relative to collection run date**.

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

If you selected **Relative to collection run date**, then enter a number of days in the **Collection Window in Days** field. The number that you enter determines a collection window in days to collect resource availability based on a rolling time window. That rolling time window adjusts itself, based on the date that you run collections. For example, if you specify 90, then resource availability is collected for the next 90 days each time from the date of the collection run.
Note: You can save your date range type selection for resource availability collection as a collection template to use later.

iii. You can collect the existing data for the resource availability.

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

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

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

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

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

**Related Topics**
- Set Up Forecast Consumption for Transfer Orders

### Collect Data Using Net Change Collection Type

You can collect data from the Oracle Fusion source system by running the net change collection or by scheduling to run the process later. Before running a Net Change collection, you must run a Targeted collection for the selected entities. After the first Targeted collection, you can run Net Change collections.

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

1. If you are in one of the Supply Chain Planning work areas, then click the Tasks panel tab. In the Tasks panel drawer, click the **Collect Planning Data** task. If you are in the Setup and Maintenance work area, then use the following:
   - Offering: Supply Chain Planning
   - Functional Area: Supply Chain Planning Configuration
   - Task: Collect Planning Data

2. Complete the following parameters for the Collect Planning Data process:
   a. Select your source system.
   b. Select the collection type as Net change.

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

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

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

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

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

6. Review the collected data in the Plan Inputs work area.
Enable Organization Group Collection for the Net Change Collection Type

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

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

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

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

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

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

Related Topics

- How You Maintain Your Supply Network Model

Load Planning Data from Others and External Source Systems

How You Load Planning Data from Files

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

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

Create CSV Files to Load Planning Data

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

1. Locate the applicable file import templates (XLSM files) in the following guide: File Based Data Import 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

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.

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

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

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

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

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

Import Templates Used to Create CSV Files for Supply Chain Planning

You can use the Microsoft Excel templates (XLSM files) to prepare the data for the supported collection entities. The templates are listed in the following guide: File-Based Data Import 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 from the Oracle Fusion Source**

The following table lists the collections entities that can be loaded into the planning data repository for the Oracle Fusion source. The Collection Entity column provides the name of the entities for which you can collect the data. The XLSM File Name column provides the template name that you will download for the respective collection entity. Download the XLSM template from the File-Based Data Import 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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<thead>
<tr>
<th>Collections Entity</th>
<th>Link in Data Import Guide</th>
<th>XLSM File Name</th>
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<tbody>
<tr>
<td>Item Costs</td>
<td>Supply Chain Planning Item Cost</td>
<td>ScpItemCostImportTemplate.xlsm</td>
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<tr>
<td>Customer Specific Item Relationships</td>
<td>Supply Chain Planning Item Substitute</td>
<td>ScpItemSubstituteImportTemplate.xlsm</td>
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<td>Planners</td>
<td>Supply Chain Planning Planners</td>
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<tr>
<td>Item Suppliers</td>
<td>Supply Chain Planning Approved Supplier List</td>
<td>ScpApprovedSupplierListImportTemplate.xlsm</td>
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<td>Demand Classes</td>
<td>Supply Chain Planning Demand Classes</td>
<td>ScpDataDemandClassImportTemplate.xlsm</td>
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<tr>
<td>Allocation Assignments and Allocation Rules</td>
<td>Supply Chain Planning Planning Allocation Rules</td>
<td>ScpPlanningAllocationRulesImportTemplate.xlsm</td>
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<td>ATP Assignments and ATP Rules</td>
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<td>ScpATPRulesImportTemplate.xlsm</td>
</tr>
<tr>
<td>Supply Update Rules</td>
<td>Supply Chain Planning Real Time Supply Updates</td>
<td>ScpRealTimeSupplyUpdatesImportTemplate.xlsm</td>
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<tr>
<td>Measures</td>
<td>Supply Chain Planning Measures</td>
<td>ScpMeasuresImportTemplate.xlsm</td>
</tr>
<tr>
<td>Booking History</td>
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<td>ScpBookingHistoryImportTemplate.xlsm</td>
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<td><strong>Note:</strong> This template has been superseded by the generic template ScpMeasuresImportTemplate.xlsm but will continue to be supported. Future enhancements will be made only to the generic measures template.</td>
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<td>Causal Factors</td>
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<tr>
<td>Cross-Reference Mapping Information</td>
<td>Supply Chain Planning Cross-Reference Data</td>
<td>ScpCrossReferenceDataImportTemplate.xlsm</td>
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</table>

**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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<td>Resources and Resource Shifts</td>
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<td>Cross Reference Mapping Information</td>
<td>Supply Chain Planning Cross-Reference Data</td>
<td>ScpCrossReferenceDataImportTemplate. xlsm</td>
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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.

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<td>Collection Entities</td>
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<td>XLSM File Name</td>
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<td>Suppliers and Supplier Sites</td>
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<td>Supply Chain Planning Approved Supplier List</td>
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<td>Interlocation Shipping Networks and Transit Times</td>
<td>Supply Chain Planning Interlocation Shipping Methods</td>
<td>ScpInterLocationShipMethodsImportTemplate. xlsm</td>
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<tr>
<td>Currencies and Currency Conversions</td>
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<td>Units of Measure, Units of Measure Conversions, and Units of Measure Class Conversions</td>
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<td>Demand Classes</td>
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<tr>
<td>Carrier, Ship Mode of Transport, and Ship Class of Service</td>
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<tr>
<td>GOP Allocation Rules and Rule Assignments</td>
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<td>Supply Chain Planning Real Time Supply Updates</td>
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<td>Order Orchestration Reference Objects: Freight Terms, FOB Points, Invoicing and Accounting Rules, Shipment Priorities, Payment Terms, Return Reason, Tax</td>
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<td>Collection Entities</td>
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<td>Classification Code, Tax Exemption Reason, Sales Credit Type, Activity Type, Document Categories, Payment Methods, and Receipt Methods</td>
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<td>Cross Reference Mapping Information</td>
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**Note:** This template has been superseded by the generic template ScpMeasuresImportTemplate. xlsm but will continue to be supported. Future enhancements will be made only to the generic measures template.
<table>
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<tr>
<th>Collection Entities</th>
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<tr>
<td>Transfer Orders (including expense type transfers)</td>
<td>Supply Chain Planning Transfer Orders</td>
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<td>Supplier Capacity</td>
<td>Supply Chain Planning Approved Supplier Capacity</td>
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<td>Resources, Resource Shifts</td>
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<tr>
<td>Resource Availability</td>
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<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>
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<tr>
<td>Work Order Supply</td>
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<td>Sourcing Rule and Assignments</td>
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<tr>
<td>Key Customer Options</td>
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</tr>
</tbody>
</table>
Run the Load Planning Data from Files Process

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

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

   Note: For more information about uploading files to the Universal Content Manager server, see the following section in the 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.

Verify Collection Processes

Verify the Load Planning Data from Files Process

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

1. In the Navigator, click Scheduled Processes.

2. In the search area, enter the process ID you noted when you submitted during the Load Planning Data from Files process. Click Search.

3. Monitor the process to verify completion.

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

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

Review Data in the Planning Data Repository

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

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

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

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

To review data that 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**.

   **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.
Glossary

**assignment set**
A group of sourcing rules, bills of distribution, or both, in which each rule or bill is assigned to an assignment level, and to attribute values for the attributes applicable to that assignment level. An assignment set defines a supply chain.

**bill of distribution**
A multilevel specification of the means by which several, specific organizations can replenish items.

**global sourcing rule**
A sourcing rule that is applicable to every organization.

**local sourcing rule**
A sourcing rule that is applicable to one, and only one, specific organization.

**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.

**profile option**
User preferences and system configuration options that users can configure to control application behavior at different levels of an enterprise.

**sourcing assignment level**
The scope, or level of granularity, for which a sourcing rule or bill of distribution is applicable when assigned within a specific assignment set.

**sourcing rule**
A specification of the means by which organizations can replenish items.