

# Oracle

## SCM Cloud

# Implementing Supply Chain Planning

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**Release 12**

This guide also applies to on-premises implementations

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# Preface

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

## Oracle Applications Help

Use the help icon  to access Oracle Applications Help in the application. If you don't see any help icons on your page, click the Show Help icon  in the global header. Not all pages have help icons. You can also access Oracle Applications Help at <https://fusionhelp.oracle.com>.

## Using Applications Help

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## Additional Resources

- **Community:** Use [Oracle Applications Customer Connect](#) to get information from experts at Oracle, the partner community, and other users.
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# 1 Introduction to the Value Chain Planning Offering

## Implementing Supply Chain Planning: Overview

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

The Value Chain Planning offering includes the following task lists:

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

The setup and implementation of Supply Chain Planning must follow the implementation of these other applications:

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

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

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

## Defining Value Chain Planning: Explained

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

- The tasks included in the task list, or functional area, and which tasks are required.
- The work areas you can use to access the tasks.

## The Tasks Included in the Task List

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

Task	Required or Optional	Comments
Manage Trading Community Source Systems	Optional	The Oracle Fusion source system is predefined.
Manage Planning Source Systems	Optional	<p>The Oracle Fusion source system is predefined.</p> <p>You add additional source systems if you plan to load data from external sources for the Oracle Fusion Global Order Promising product.</p>
Manage Planning Profile Options	Optional	<p>For Oracle Fusion Planning Central, you can use the predefined values for all of the profile options.</p> <p>To use the Order Promising work area, there is one profile option you must define: the Order Promising Sourcing Assignment Set.</p>
Collect Planning Data	Required	<p>Planning Central and Order Promising work areas use data collected into the planning data repository.</p> <p>You must collect planning data to use either, or both, of these products.</p>
Load Planning Data from Files	Optional	<p>You can load forecasts and shipment history from files for usage by the Planning Central work area, but doing so is not required.</p> <p>If you are using external sources for Order Promising work area, you must load data from these external source systems.</p>
Configure Planning Analytics	Required	<p>A minimum set of steps must be completed for this task for plans to run successfully.</p> <p>Collect calendars from the Oracle Fusion source.</p> <p>Add the following to the default Dimension catalog:</p> <ul style="list-style-type: none"> <li>At least one calendar to the Time hierarchy.</li> <li>At least one product catalog to the Product Hierarchy, if the default Planning Catalog is not collected.</li> </ul> <p>Default hierarchies can be used for the other dimensions.</p>



## Work Areas to Use to Access the Tasks

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

- **Setup and Maintenance:** Use the Value Chain Planning offering on the Setup and Maintenance work area. For more details regarding using the Setup and Maintenance work area to perform setup tasks, see the Oracle SCM Cloud Implementing Common Features for Oracle SCM Cloud guide.
- **Planning Central:** Use the Task menu to access these tasks from the Planning Central work area.



## 2 Implementing Planning Source Systems and Profile Options

### Managing Trading Community Source Systems for Data Collections: Explained

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

If you plan to collect data from external source systems for Oracle Fusion Global Order Promising or Oracle Fusion Order Management, then each source system must first be added on the Manage Trading Community Source Systems page in the Setup and Maintenance work area. To reference a source system in a collections process, the Enable for Order Orchestration and Planning check box must be selected. To open the Manage Trading Community Source Systems page, navigate to the Setup and Maintenance work area, click Manufacturing and Supply Chain Materials Management offering, and click the Customers functional area.

### Managing Planning Source Systems for Data Collections: Explained

To populate the planning data repository, also known as the order orchestration and planning data repository, you collect data from the Oracle Fusion source system. On the Manage Planning Source Systems page, you enable organizations for collections.

#### The Oracle Fusion Source System

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

#### 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 page.

#### Organizations Enabled for Data Collections

On the Manage Planning Source Systems page, you use the Manage Organization List button to access the list of organizations for the source system. To enable organizations for data collections, 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, you can collect organizations first before other planning data. You can confirm the collection results on the Supply Network Model page.

#### Related Topics

- [Enabling Organizations for Data Collections: Points to Consider](#)

## Managing Planning Profile Options: Critical Choices

For Oracle Fusion Planning Central and Oracle Fusion Global Order Promising, set profile options to specify the following:

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

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

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

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

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

## Planning Central Processes

This table lists the profile options that affect Planning Central processes. If the profile option does not have a default value, the Default Value column in the table is blank.

Profile Option Display Name	Default Value	Effect
Catalog for Sourcing Assignments		Defines the catalog to be used when defining sourcing assignment sets.
Decimal Precision for Quantity Display	3	Sets the precision to which quantities are rounded for display in planning products.

Profile Option Display Name	Default Value	Effect
Default Bookings History Measure	Booked Item by Booked Date	Specifies the default bookings history measure to use in demand forecasting.
Default Capacity Display Calendar		Specifies the default calendar to use for the display of supplier capacity and resource availability in supply plans.
Default Shipments History Measure	Requested Item by Shipped Date	Specifies the default shipments history measure to use in demand forecasting.
Disable Search Warning in Planning Pages	No	Defines whether to disable the displaying of a warning if a user tries to run a search without including certain key criteria used to limit the amount of information returned.
Enable Data Security for Planning	No	Enables planning data security to determine access to Item, Organization, Customer, and Supplier data.
Fixed Plan Start Date		Specifies the fixed plan start date for planning applications, and in order promising, for selected organizations using the MM/DD/YYYY date format.
Full Data Access Allowed for Entities with No Conditions Defined	Yes	Enables full data access allowed, instead of no data access allowed, for entities with no data access conditions defined.
Maximum Rows Displayed in Planning Search Pages	100000	Sets the maximum number of rows to display for searches that return large volumes of data.
Plan to Display Automatically		Specifies the name of the plan to be automatically displayed.
Share Plan Partitions	No	Specifies whether a customer environment is partitioned by each plan. When enabled, a single partition is created for all plans.

## Check Availability Process

This table lists the profile options that affect the Check Availability process. If the profile option does not have a default value, the Default Value column in the table is blank.

Profile Option Display Name	Default Value	Effect
Order Promising Sourcing Assignment Set		Defines which sourcing assignment set will be used by the supply allocation and check availability processes

Profile Option Display Name	Default Value	Effect
Order Promising Horizon in Days	700	Sets the number of days into the future for which Oracle Fusion Global Order Promising can schedule orders. Demands with dates after the horizon cutoff are not scheduled.
Supplier Capacity Accumulation Lead Time Multiplier	1	Defines the multiplier of the approved supplier list lead time to be used to determine the date when to begin the accumulation of supplier capacity

## Check Availability Page

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

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

## Review Supply Availability Page and Supply Availability Report

This table lists the profile options that affect the Review Supply Availability page and the Supply Availability report. If the profile option does not have a default value, the Default Value column in the table is blank.

Profile Option Display Name	Default Value	Effect
Default Display Days in Review Supply Availability Page	21	Sets the number of horizon days for the Review Supply Availability page if end date was not entered on the Check Availability page

Profile Option Display Name	Default Value	Effect
Organization Calendar for Supply Buckets in Supply Availability Report		Defines the organization calendar to use for the weekly and period supply buckets in the Supply Availability report

## Assignment Set Assignment Level Selection

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

Profile Option Display Name	Effect
Sourcing Rule Category Set	Determines which category set is used when defining assignment sets

### *Related Topics*

- [Profile Options: Overview](#)
- [Hierarchy in Profile Levels: Explained](#)





## 3 Implementing Collections

### Collecting Planning Data: Explained

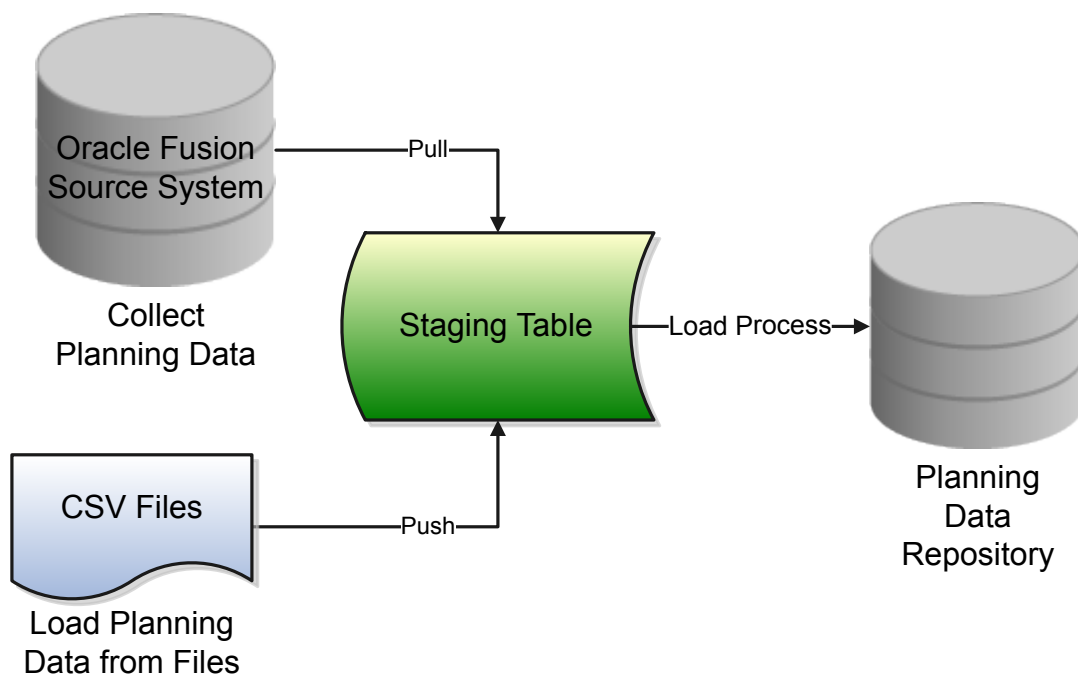
To run plans from the Planning Central work area, you must collect data into a planning data repository. Order promising and order management processes also use the planning data repository to run respective processes.

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

- Collect Planning Data
- Load Planning Data from Files

Depending on your security privileges, you can perform these tasks from either the Planning Central work area or you can navigate to the Setup and Maintenance work area, Value Chain Planning offering, Value Chain Planning Configuration functional area.

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



### Collect Planning Data

The Collect Planning Data process first pulls the data from the Oracle Fusion source system into staging tables. The process then loads the 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

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 with data from 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 template files provided for use as import templates.
2. Import the CSV files. On the File Import and Export page, 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.

## Net Change and Targeted Collection Types: Explained

When you collect planning data either from the Oracle Fusion source system or from files, one of the parameters you specify is the Collection Type parameter. For this parameter, you can select either the Net Change or Targeted collection type. The Collection Type parameter is available in both Collect Planning Data and Load Planning Data from Files tasks. You can open both these tasks from one of the Supply Chain Planning work areas. If you have the security privilege, you can also navigate to the Setup and Maintenance work area, Value Chain Planning offering, Value Chain Planning Configuration functional area, and click the tasks.


You choose the Net Change collection type when you want to collect changed data and new records since the last successful collection cycle. You chose the Targeted collection type when collecting a significant volume of source system data. You use the Targeted collection type in scenarios such as bulk upload of transaction data, instance upgrade, and change in collection filters.

### 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 typically 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.

### Targeted

You use the Targeted collection type when you want to completely refresh data in the data repository. In this mode, the existing data for the selected entities is deleted 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.

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


You must perform data collections to populate the planning data repository. In addition to being used by Oracle Planning Central Cloud processes, the collected data is used by Oracle Order Management Cloud order orchestration processes and by Oracle Global Order Promising Cloud 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. You can also load data from files for specific entities.

## 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 Oracle Global Order Promising Cloud or Oracle Planning Central Cloud.

 **Note:** Before collecting data from your Oracle Fusion source system, you must define at least one organization for the source system. After setting 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 no organizations are enabled for collections when a collections process runs, then the collections process ends with an error.

## Order Promising

The Global Order Promising processes use an in-memory copy of the data from the planning data repository. When order orchestration processes send a scheduling request or a check availability request to Oracle Global Order Promising Cloud, the order promising processes use the data stored in main memory to determine the response to send back to order orchestration. After a cycle of data collections is performed, use the Refresh and Start the Order Promising Server scheduled process to refresh the Global Order Promising data store with the most current data from the data repository and to load the data into main memory for the order promising processes to use.

### *Related Topics*

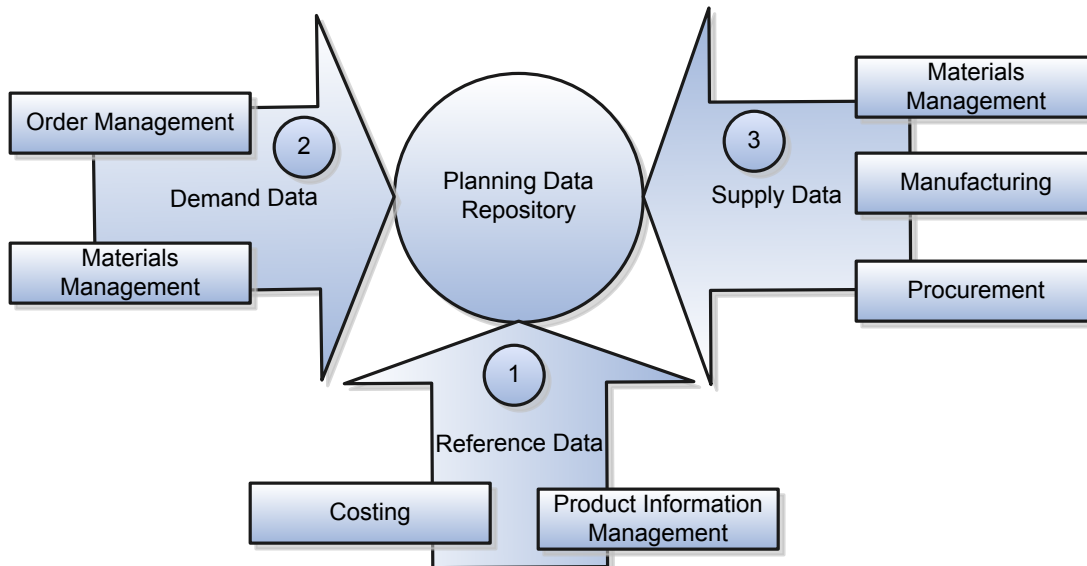
- [Refreshing the Global Order Promising Engine: Explained](#)

# Collecting Planning Data from the Oracle Fusion Source System

## Collecting Reference, Supply, and Demand Data: Explained

When you collect planning data from the Oracle Fusion source system, 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 following figure illustrates the three categories of data that you can collect:



### 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. You also use Oracle Fusion Planning Central to collect the following items:

- Item structures: To explode item-level demand into component demands and supplies.
- Work Definitions: To assign the resource dependencies for 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 two potential sources of demand data:

- 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, while current shipments can consume the forecast.

## Supply Data

You collect supply data from three sources:

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

# Using Collection Filters and Collection Templates: Explained

You use the collection filters and collection templates options when you are on the Collect Planning Data page. You can open the Collect Planning Data page from either the Planning Central work area or you can navigate to the Setup and Maintenance work area, Value Chain Planning offering, Value Chain Planning Configuration functional area.

## Collection Filters

You use collection filters to improve collections performance, efficiency, and 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.

## Collection Templates

You use collection templates to collect data from the Collect Planning Data page. Using collection templates helps you to:

- Reduce time to create and submit a collections request.
- Save collection templates as needed for specific sets of data collection entities that can be collected together.

For example, if certain supply planning transaction data collection entities, such as On Hand, Purchase Orders, and Purchase Requisitions are collected often, then save these selections as a collection template. It reduces the overhead of making the same selections for subsequent collections cycles initiated from this page for the data elements in question.

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

You can create collection template using the Collect Planning page by making selections of the data collection entities and saving the template for future use.

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

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


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

1. Click one of the Value Chain Planning work areas such as **Plan Inputs** or **Planning Central**, or the **Setup and Maintenance** work area.
2. If you have clicked Setup and Maintenance, then in the Setup and Maintenance work area, select your offering. On the Setup: Value Chain Planning page, click the **Value Chain Planning Configuration** functional area, and then click the **Collect Planning Data** task.
3. If you have clicked one of Value Chain Planning work areas, then click the **Tasks** panel tab. In the Tasks panel drawer, click the **Collect Planning Data** task.
4. Complete the following parameters for the Collect Planning Data process:
  - a. Select your source system.
  - b. For the collection type, select **Targeted**.
  - c. Select the collection filters.
  - d. In the Reference Data tab, move the required reference entities to the Selected Entities area.
  - e. In the Demand Planning Data tab, select **Collection Time Frame Options**. To collect history data and attributes, select one or more **Shipments History Measure** and **Bookings History Measures**. To collect amount data from history, select the **Collect amount data for history** check box. To collect historical transfer orders, select the **Collect historical transfer orders** check box. Select **Order Types to Include**. To include price list, select the **Include price lists** check box.


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

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

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

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

- f. In the Supply Planning Data tab, move the required supply entities to the Selected Entities area. If you collect Resource Availability, provide the Resource Availability start date and end date.

 **Note:** Before collecting the Resource Availability supply entity, you must run the **Update Resource Availability Job** scheduled process successfully.


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

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

You can collect data from the Oracle Fusion source system by launching the net change collection or by scheduling to run the process later. You cannot collect the demand planning data using the Net Change collection type.

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

1. In the Navigator, click **Setup and Maintenance**.
2. In the Setup and Maintenance work area, click the Value Chain Planning offering, and click **Setup**.
3. On the Setup: Value Chain Planning page, click the Value Chain Planning Configuration functional area, and then click the Collect Planning Data task.
4. Complete the following parameters for the Collect Planning Data process:
  - a. Select your source system.
  - b. Select the collection type as Net change.

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

- c. In the **Reference Data** tab, move the required reference entities to the Selected Entities area.
  - d. In the **Supplies Planning Data** tab, move the required supply entities to the Selected Entities area.
5. (Optional) Click the **Schedule** tab and set collections to run as soon as possible or schedule to run at a different time.
6. Click **Submit** to launch the collections process.
7. Monitor the collection status using the Scheduled Processes page.
8. Review the collected data in the Plan Inputs work area.

## Loading Planning Data from Files

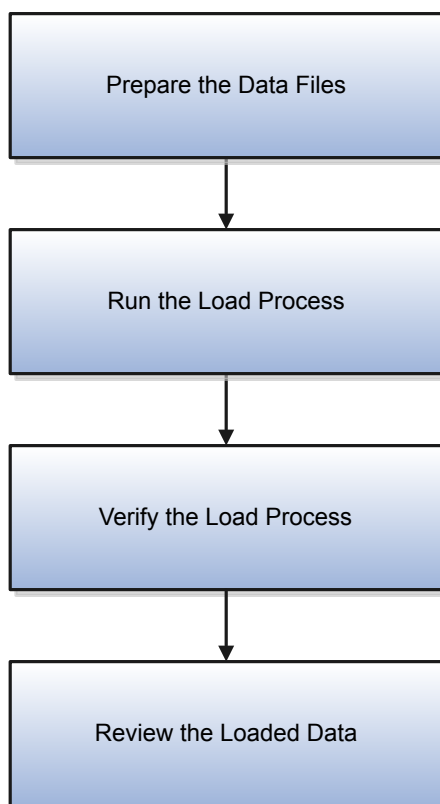
## Loading Planning Data from Files: Overview

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

 **Note:** To create the CSV files, you can use a set of Microsoft Excel template files that are provided for this purpose.

You use the targeted mode when you want to refresh data for selected entities in the system. 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 excel template
2. Run the process to load planning data from files
3. Verify the load planning data process
4. Review the process status




## Creating CSV Files Used to Load Planning Data: Procedure

To perform the Load Planning Data from Files task in the Planning Central or Setup and Maintenance work areas, 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, such as the ExternalForecastImportTemplate.xlsm file, and complete the file import template worksheet.  
You must activate 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 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, click the Generate CSV File button provided in the worksheet to generate the CSV file. The Generate CSV File button is located in the Instructions and CSV Generation worksheet of the workbook.
4. Compress the CSV file into a zip file format using a compression utility.

 **Note:** You can include multiple CSV files in a single compressed file for a source system. The load process uploads them in 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 CSV file used to prepare planning data for loading.

## Data Collection Sequence: How Collection Entities Are Related

This topic explores the sequence that you should follow for data collection. Data collection involves collecting entities in a predefined sequence. The collected entities form the basis for supply planning calculations. To have accurate data, you must ensure to collect the entities in a proper sequence. You cannot collect some entities without collecting their precursor entities. The data collection sequence is very crucial when you collect data from an external source system using CSV files.

If you run targeted collections for all entities, you can safely ignore the collections sequence information because collections automate the collections 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

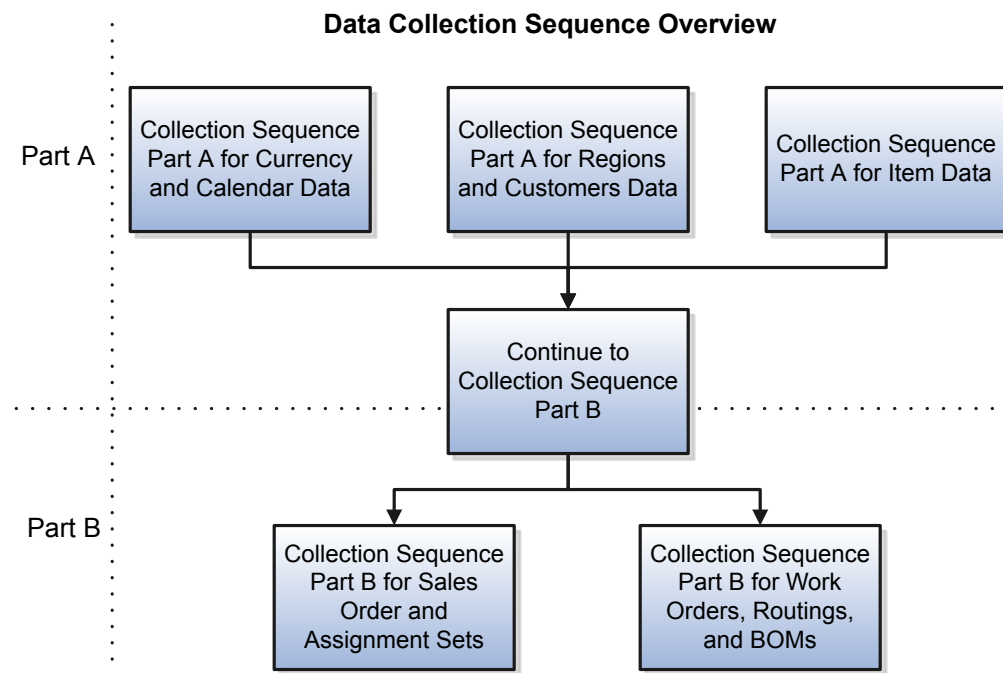
- Collections Sequence Part A for Region, Location, and Customer Data
- Collections Sequence Part A for Currency, Calendar, Demand Class and UOM Data

The data groups in Part B are:

- Collections Sequence Part B for Sales Order and Assignment Sets
- Collection Sequence Part B for Work Orders, Routings, and BOM


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.

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

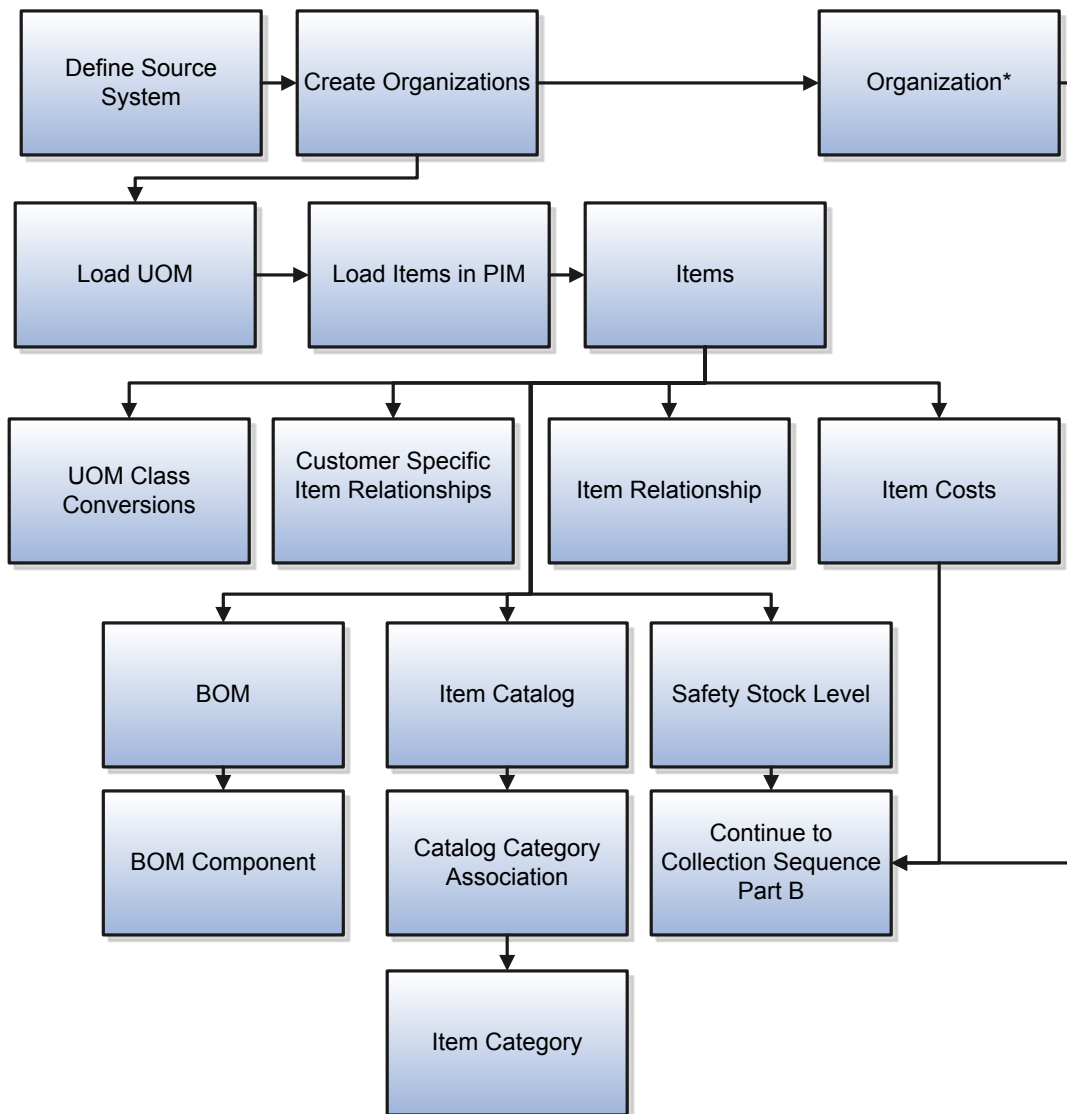


## Collections Sequence Part A for Item Data

The following figure shows the collections sequence to follow while collecting Item data from external source systems. This figure represents only half of the entities for collecting Item data.

 **Note:** The Organization entity is marked with an asterisk because you can collect other entities such as Planner, Item Cost, Subinventory, Carrier, Calendar Assignment, Supplier, and Supplier Site after collecting Organization. For more information on the collection sequence for these entities, see the Collections Sequence Part A for Currency, Calendar, Demand Class, and UOM Data figure. Refer to the entities that are collected after Organization. Also, ensure that you collect Location before collecting Supplier Site.

### Collection Sequence Part A for Item Data

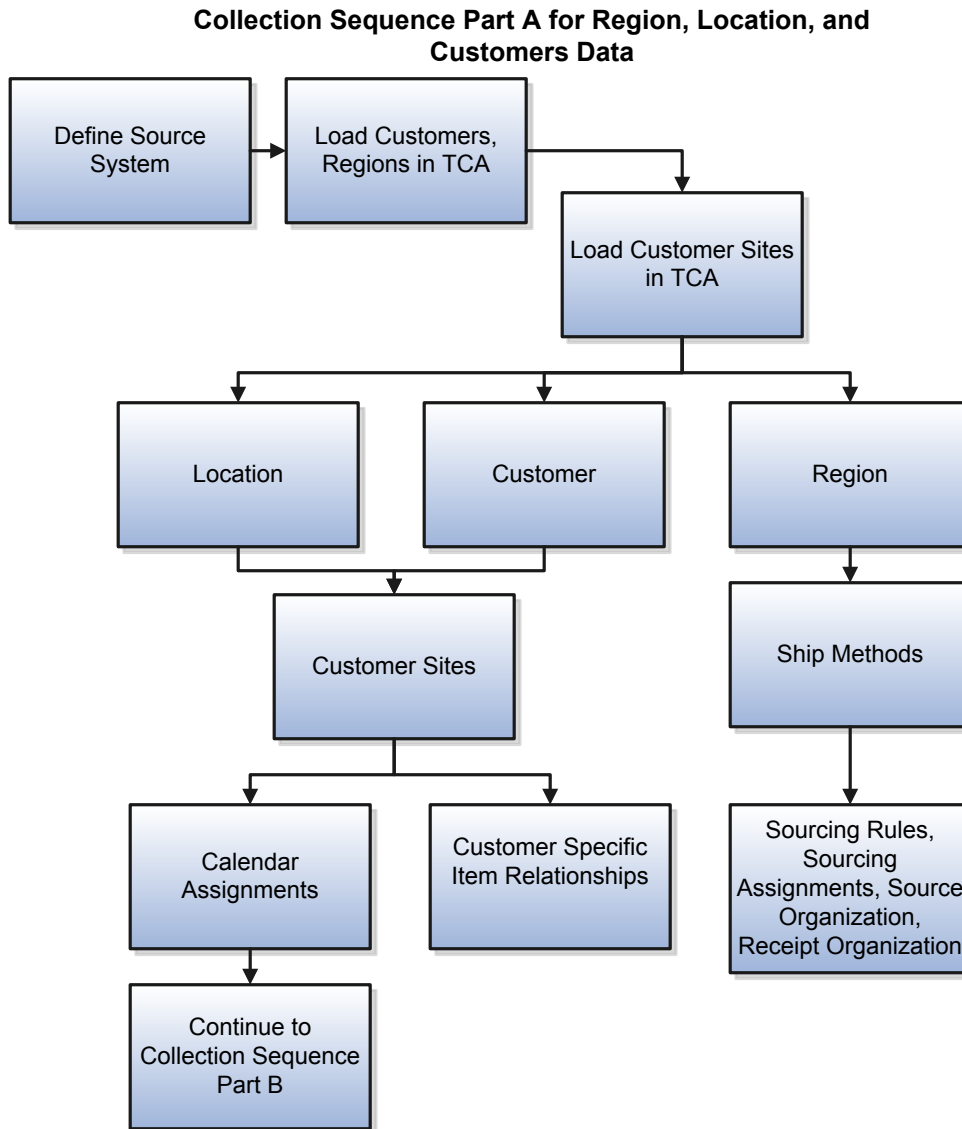


When you collect the data described here, continue to the collection sequence Part B described in the following subsections.

- Collection Sequence Part B for Sales and Order and Assignment Sets
- Collection Sequence Part B for Work Orders, Routings, and BOM

## Collections Sequence Part A for Region, Location, and Customer Data

The following figure shows the collections sequence to follow while collecting Regions and Customers data from external source systems. This figure 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.

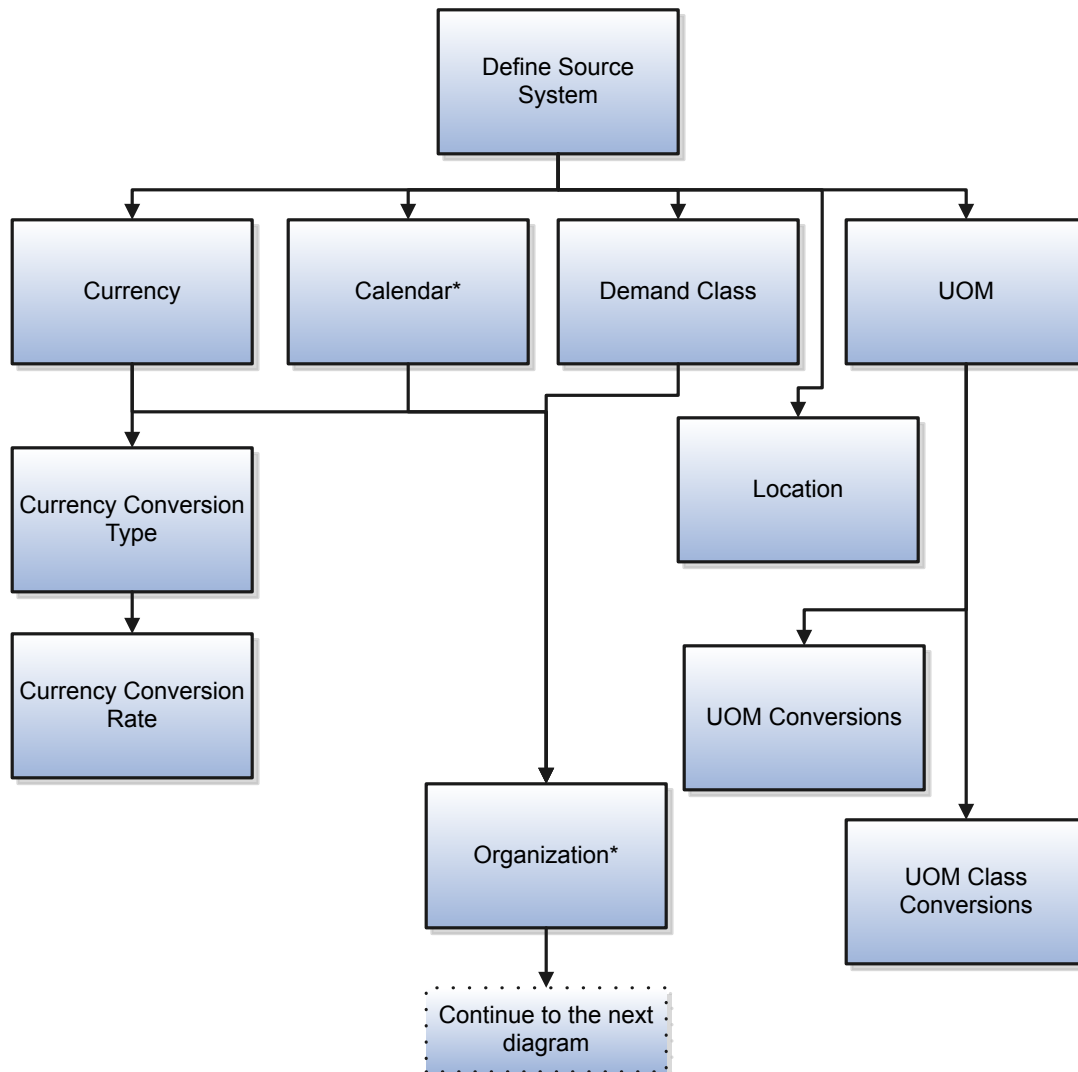
- Collection Sequence Part B for Sales and Order and Assignment Sets
- Collection Sequence Part B for Work Orders, Routings, and BOM

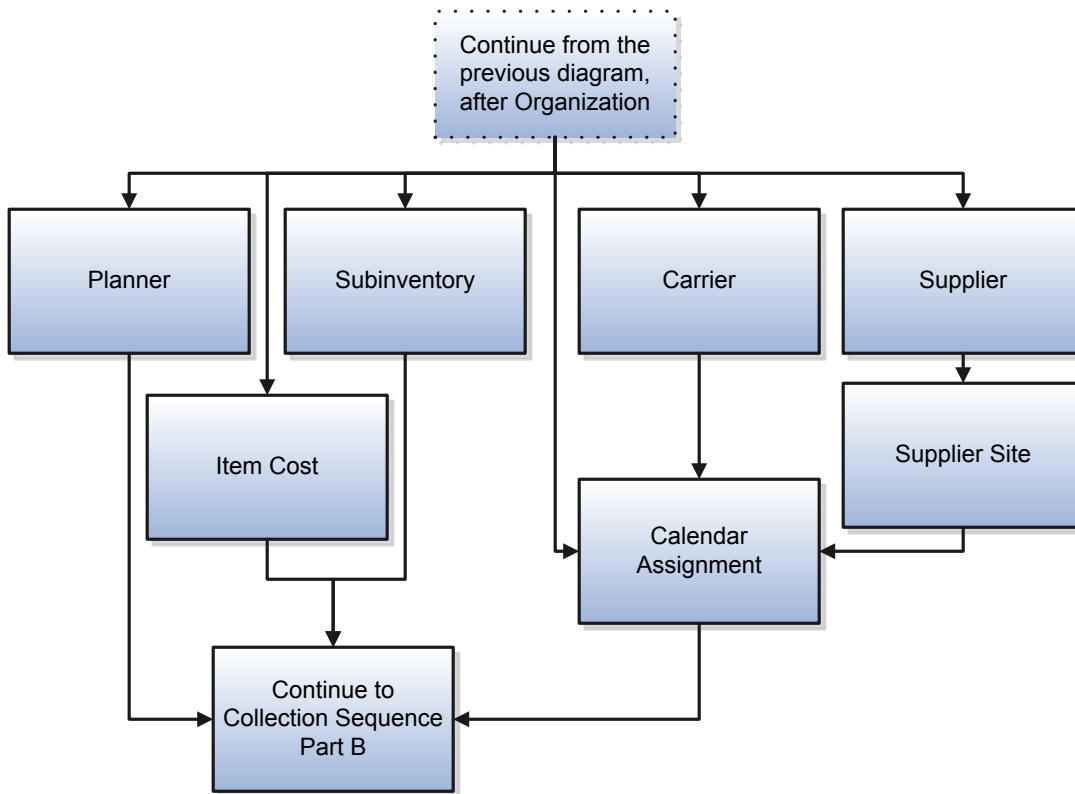
## Collections Sequence Part A for Currency, Calendar, Demand Class, and UOM Data

The following figure shows the collections sequence to follow while collecting Currency, Calendar, Demand Class, and UOM data from external source systems.

 **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 that are associated with Calendar, see the Calendar Upload Sequence figure.

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





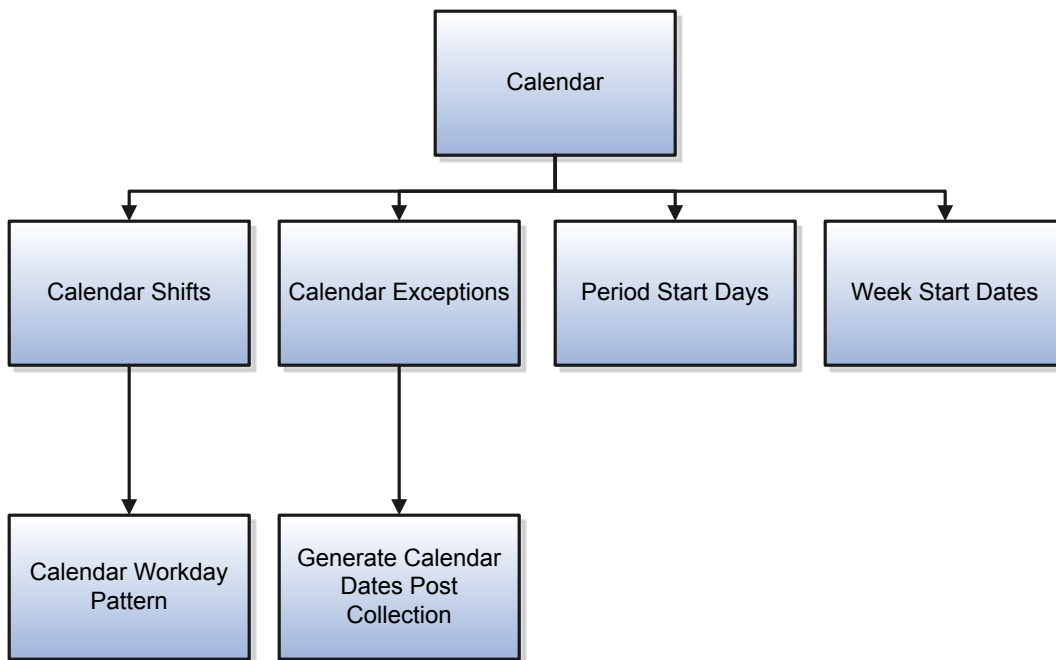
When you collect the data described here, continue to the collection sequence Part B described in the following subsections.

- Collection Sequence Part B for Sales and Order and Assignment Sets
- Collection Sequence Part B for Work Orders, Routings, and BOM

## Collection Sequence for Calendar Data

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

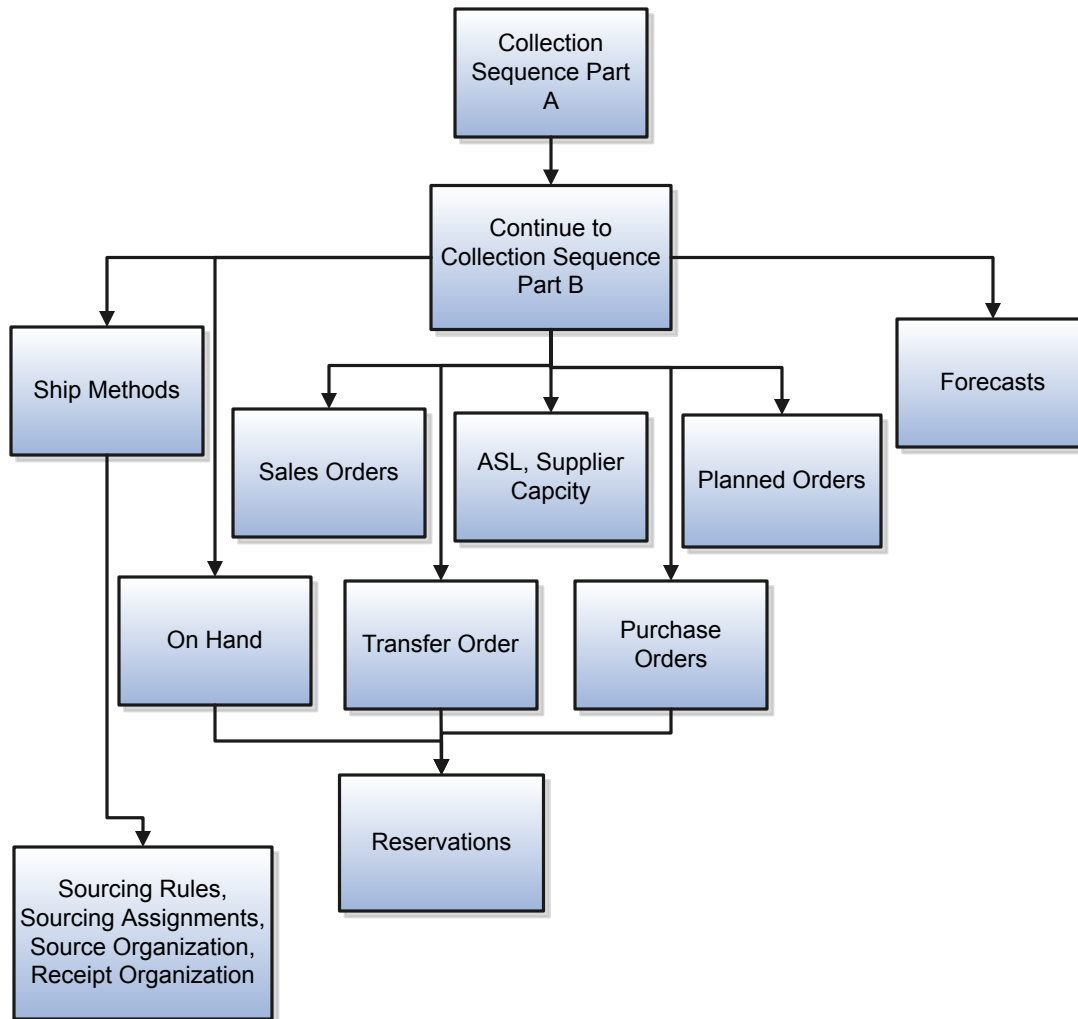
**Calendar Upload Sequence**



## Collections Sequence Part B for Sales Order and Assignment Sets

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

**Collections Sequence Part B for Sales Orders and Assignments Sets**

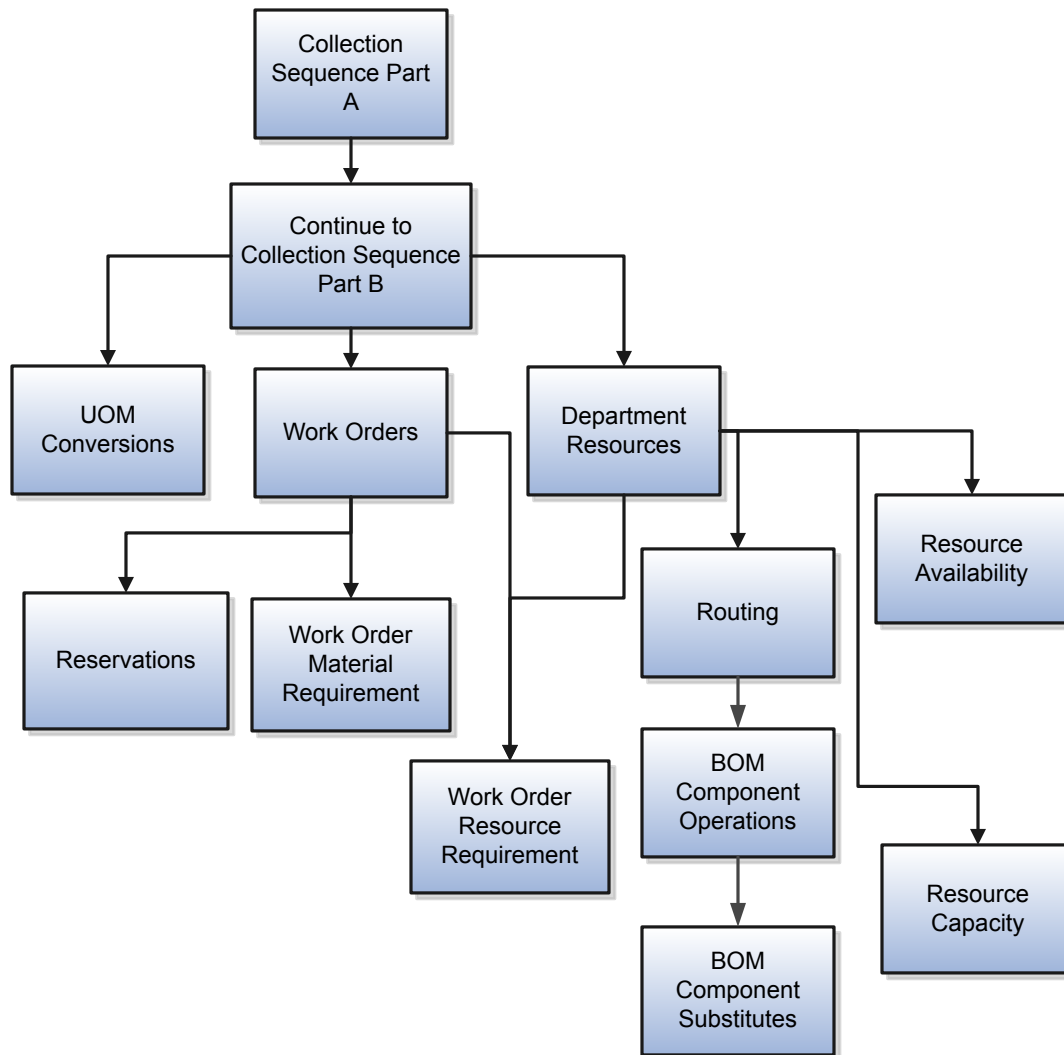




## Collection Sequence Part B for Work Orders, Routings, and BOM

The following figure shows the collections sequence to follow while collecting Work Orders, Routings, and BOM 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, Routings and BOM**



## Using the Import Templates to Create the CSV Files for Supply Chain Planning: Explained

You can use the Microsoft Excel templates (XLSM files) to prepare the data for the supported collection entities. The templates are listed in the following guide: File-Based Data Import for Oracle Supply Chain Management Cloud. Extract the templates to a local drive, enter appropriate data as described in the template, and generate CSV files. These CSV files are compressed to a zipped file format and uploaded using the File Import and Export utility before loading the planning data to the planning data repository.

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. The Link in Data Import Guide column provides the name of the topic in the File-Based Data Import for Oracle Supply Chain Management Cloud guide from where you will download the template. For example, to collect data for the Item Costs collection entity, refer to the Item Cost Import topic in the File-Based Data Import for Oracle Supply Chain Management Cloud guide.

Collections Entity	Link in Data Import Guide	XLSM File Name
Item Costs	Item Cost Import	ItemCostImportTemplate. xlsx
Customer Specific Item Relationships	Item Substitute	ItemSubstituteImportTemplate. xlsx
Planners	Planners Import	PlannersImportTemplate. xlsx
Item Suppliers	Approved Supplier List	ApprovedSupplierListImportTemplate. xlsx
Demand Classes	Demand Classes	DemandClassImportTemplate. xlsx
Allocation Assignments	Planning Allocation Rules Import	PlanningAllocationRulesImportTemplate. xlsx
Allocation Rules	Planning Allocation Rules Import	PlanningAllocationRulesImportTemplate. xlsx
ATP Assignments	ATP Rules Import	ATPRulesImportTemplate. xlsx
ATP Rules	ATP Rules Import	ATPRulesImportTemplate. xlsx
Supply Update Rules	Real Time Supply Updates	RealTimeSupplyUpdatesImportTemplate. xlsx
Booking History	Bookings History	BookingHistoryImportTemplate. xlsx
Shipment History	Shipments History	ShipmentHistoryImportTemplate. xlsx
Price Lists	Price List Import	PriceListImportTemplate. xlsx

Collections Entity	Link in Data Import Guide	XLSM File Name
Causal Factors	Causal Factors	CausalFactorsImportTemplate. xlsx
Forecast Measures	Forecast Measures	ForecastMeasureImportTemplate. xlsx
Forecasts	External Forecast	ExternalForecastImportTemplate. xlsx
Safety Stock Levels	Safety Stock Level	SafetyStockLevelImportTemplate. xlsx
Supplier Capacity	Approved Supplier Capacity Import	ApprovedSupplierCapacityImportTemplate. xlsx
Planned Order Supplies	Planned Order Supply	PlannedOrderSupplyImportTemplate. xlsx
Sourcing Rule and Assignments	Sourcing Import	SourcingImportTemplate. xlsx
Cross-Reference Mapping Information	Cross Reference Data Import	CrossReferenceDataImportTemplate. xlsx

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

Collections Entity	Link in Data Import Guide	XLSM File Name
Organizations (Warehouses)	Organization Import	OrganizationImportTemplate. xlsx
Organization Site (Including Organization Site - Internal Location Mapping)	Organization Import	OrganizationImportTemplate. xlsx
Subinventories	Subinventory Import	SubInventoryImportTemplate. xlsx
Suppliers	Supplier	PlanningSupplierImportTemplate. xlsx
Supplier Sites	Supplier	PlanningSupplierImportTemplate. xlsx
Currencies	Currency	CurrencyImportTemplate. xlsx
Currency Conversion Types	Currency	CurrencyImportTemplate. xlsx
Currency Conversion Rates	Currency	CurrencyImportTemplate. xlsx
Units of Measure	Unit of Measure	UOMImportTemplate. xlsx


Collections Entity	Link in Data Import Guide	XLSM File Name
Units of Measure Conversions	Unit of Measure	UOMImportTemplate. xlsx
Units of Measure Class Conversions	Unit of Measure	UOMImportTemplate. xlsx
Calendars	Calendar Import	CalendarImportTemplate. xlsx
Calendar Exceptions	Calendar Import	CalendarImportTemplate. xlsx
Calendar Shifts	Calendar Import	CalendarImportTemplate. xlsx
Week Start Dates	Calendar Import	CalendarImportTemplate. xlsx
Period Start Dates	Calendar Import	CalendarImportTemplate. xlsx
Calendar Shift Workday Pattern	Calendar Import	CalendarImportTemplate. xlsx
Calendar Associations	Calendar Assignments Import	CalendarAssignmentsImportTemplate. xlsx
Ship Mode of Transport	Carrier Import	CarrierImportTemplate. xlsx
Ship Class of Service	Carrier Import	CarrierImportTemplate. xlsx
Carrier	Carrier Import	CarrierImportTemplate. xlsx
ATP Assignments	ATP Rules Import	ATPRulesImportTemplate. xlsx
ATP Rules	ATP Rules Import	ATPRulesImportTemplate. xlsx
Freight Terms	Order Orchestration	OrderOrchestrationImportTemplate. xlsx
FOB Points	Order Orchestration	OrderOrchestrationImportTemplate. xlsx
Invoicing and Accounting Rules	Order Orchestration	OrderOrchestrationImportTemplate. xlsx
Shipment Priorities	Order Orchestration	OrderOrchestrationImportTemplate. xlsx
Payment Terms	Order Orchestration	OrderOrchestrationImportTemplate. xlsx
Return Reason	Order Orchestration	OrderOrchestrationImportTemplate. xlsx
Tax Classification Code	Order Orchestration	OrderOrchestrationImportTemplate. xlsx
Tax Exemption Reason	Order Orchestration	OrderOrchestrationImportTemplate. xlsx

Collections Entity	Link in Data Import Guide	XLSM File Name
Sales Credit Type	Order Orchestration	OrderOrchestrationImportTemplate. xlsx
Activity Type	Order Orchestration	OrderOrchestrationImportTemplate. xlsx
Document Categories	Order Orchestration	OrderOrchestrationImportTemplate. xlsx
Payment Methods	Order Orchestration	OrderOrchestrationImportTemplate. xlsx
Receipt Methods	Order Orchestration	OrderOrchestrationImportTemplate. xlsx
On Hand	Supply Onhand	OnhandImportTemplate. xlsx
Purchase Orders	Purchase Order Requisition	PurchaseOrderRequisitionImportTemplate. xlsx
Purchase Requisitions	Purchase Order Requisition	PurchaseOrderRequisitionImportTemplate. xlsx
PO in Receiving	Purchase Order Requisition	PurchaseOrderRequisitionImportTemplate. xlsx
In Transits	Purchase Order Requisition	PurchaseOrderRequisitionImportTemplate. xlsx
Transfer Orders	Transfer Order	TransferOrderImportTemplate. xlsx
Cross Reference Mapping Information	Cross Reference Data Import	CrossReferenceDataImportTemplate. xlsx

## Loading Planning Data from Files: Procedure

To load planning data from files, first you must prepare the data you want to load. You can open the Load Planning Data from Files task from one of the Supply Chain Planning work areas. Depending on your security privilege, you can also navigate to the Setup and Maintenance work area, Value Chain Planning offering. On the Value Chain Planning offering page, click Setup and then click the Value Chain Planning Configuration functional area. Select the task from the Task list. You must create the necessary CSV files used to create files for import. This procedure explains how to load planning data from files after the data has been prepared.

1. Use the File Import and Export page to upload the previously prepared CSV files to the Universal Content Manager (UCM).

 **Note:** For more information about uploading files to the UCM 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, select the Load Planning Data from Files task.
3. Complete the following parameters on the Load Planning Data from Files page:
  - a. Select the source system.
  - b. Select Collection Type: **Net change** or **Target**.
  - c. Select the zip file you previously imported into the Universal Content Manager.
4. Click **Submit**. Make a note of the process ID. You will need this process ID to review the status of the process.

## Verifying Collection Processes and Reviewing Data in the Planning Data Repository

### Verifying the Load Planning Data Process: Procedure

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

1. In the Navigator, click **Scheduled Processes**.
2. In the search area, enter the process ID you noted when you submitted during the Load Planning Data process. Click **Search**.
3. Monitor the process to verify completion.

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

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

### Reviewing Data in the Planning Data Repository: Explained

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

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

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

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

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

To review data that is not part of the supply network model, use the Plan Inputs page layout. Data you can view using the Plan Inputs page layout includes the following:

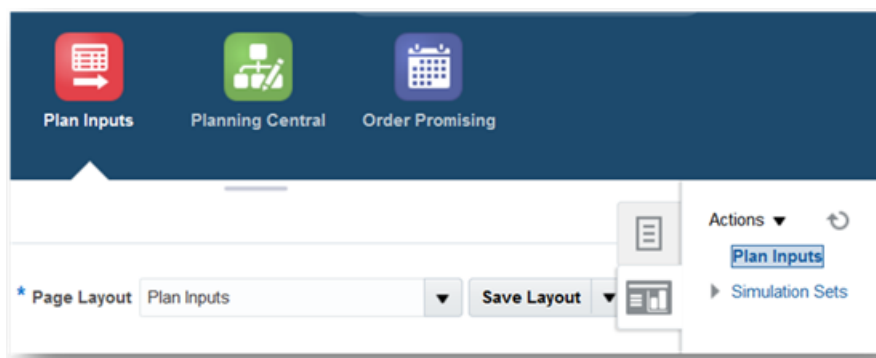
- Supply data
- Demand data


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.





# 4 Configuring Planning Analytics

## Setting Up Planning Analytics: Explained

Configuring planning dimensions and hierarchies on the Configure Planning Analytics page in one of the Supply Chain Planning work areas is a key setup to use Supply Chain Planning analytics. It has a unified dimensional hierarchy for various uses. Depending on your security privilege, you can also open the Configure Planning Analytics page from the Setup and Maintenance work area, Value Chain Planning offering. On the Value Chain Planning offering page, click Setup and then click the Value Chain Planning Configuration functional area.

For supply and demand plans to run successfully, you must complete the following Configure Planning Analytics tasks:

- Set Up Dimension Catalogs
- Set Up Measure Catalogs
- Set Up Levels and Attributes

You can use the default hierarchies for most of the dimensions until such time that planners require some other hierarchy.

If the default planning catalog named Default Catalog is not collected, then you must select at least one product hierarchy. If Default Catalog is collected, then the predefined three-level Product hierarchy is selected as a product hierarchy by default. You can optionally add or change the product hierarchy. At least one product hierarchy is required.

## Dimensions and Dimension Catalogs

### Dimensions and Dimension Catalogs: Explained

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

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

Each dimension catalog has a collection of hierarchies in different dimensions that is enabled for use in a single plan. By default, all predefined hierarchies are available in Planning Analytics. You can disable certain dimensions that are not relevant for your plans. For example, if you are only using demand plans, then supplier, resource, and order type dimensions may not be relevant.

The following hierarchies are predefined in Supply Chain Planning:

- Customer
- Demand Class
- Exception Type
- Order Type

- Organization
- Product
- Resource
- Supplier
- Time

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

In the Dimension Catalog tab, several hierarchies are available in various dimensions. For example, you can select an organization type hierarchy, a product type hierarchy, or a customer hierarchy to use in a specified plan for analysis. After you define a dimension catalog, you can assign it to a plan that will use the set of hierarchies for analysis.

You can create multiple dimension catalogs, but you can select only one catalog to be the default used in all plans. If you do not select a default catalog, the predefined catalog named Default Catalog is used.

## Setting Up Dimension Catalogs: Points to Consider

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

The following is a list of dimensions in Supply Chain Planning and the points to consider when selecting hierarchies for the dimensions:

- Product
- Organization
- Customer
- Resource
- Supplier
- Exception Type
- Order Type
- Time

### Hierarchy Selections for the Product Dimension

A predefined three-level Product hierarchy is included in the default dimension. Other Product hierarchies (other item catalogs in Oracle Fusion Product Model that are collected into Planning Central) can be optionally enabled by users as custom product hierarchies.

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

- Controlled at = Master-Level (not Org-Level)
- Allow hierarchy of categories = No
- Default category must be selected
- Allow multiple item category assignments = Not selected

- Catalog Content = Items at Leaf Level

If this catalog is not set up with these attributes, the planning functional area catalog are not collected and the Product hierarchy will not be populated. This will result in the forecasting engine not being able to use the product aggregation and some of the predefined tables and graphs to not work correctly.

## Hierarchy Selections for the Organization Dimension

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

## Hierarchy Selections for the Customer Dimension

The default Customer hierarchy has three fixed levels: Customer site, Customer, and Customer Class. This default customer hierarchy is defined in Oracle Fusion TCA and you can only modify it there.

## Hierarchy Selections for the Resource Dimension

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

## Hierarchy Selections for the Supplier dimension

The default Supplier hierarchy has two fixed levels: Supplier and Supplier Site.

## Hierarchy Selections for the Exception Type and Order Type Dimensions

Predefined Exception Type and Order Type dimensions are included in the Default dimension catalog. Each has only a single hierarchy.

## Hierarchy Selections for the Time Dimension

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

# What's a dimension in Supply Chain Planning?

A dimension is a structure that organizes data. It categorizes data to enable you to answer business questions. Commonly used dimensions are customers, products, and time.

# How can I use dimensions in Supply Chain Planning?

Supply Chain Planning applications come with predefined hierarchies in the Product dimension. These predefined hierarchies are part of the Dimension catalog structure in Oracle Fusion Product Model. Integrations with EBS and third-party systems where the product dimensions can still be maintained and uploaded to Fusion Planning system is supported.

## What's a dimension catalog in Supply Chain Planning?

In Supply Chain Planning, a dimension catalog is a selected list of dimensions enabled for use in a single plan. The Default dimension catalog is used for all plans in Planning Central.

## Can I modify the default dimension catalog?

Yes, you can modify the Supply Chain Planning default dimension catalog.

## Measure Catalogs

### Measure Catalogs: Explained

The measure catalog is similar to the dimension catalog. Each measure catalog has a collection of measures that you can enable for use in a single plan in the Planning Central work area. Oracle provides predefined measures from which to select to perform any type of analysis.

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

The predefined measure catalog is the system default. When you create a new plan, the measure catalog that is used is based on the **Default** check box located on the Measure Catalogs tab. If you change the default later, the plan would continue to use the same measure catalog that it was created with.

## Can I modify the default measure catalog?

No. The default measure catalog is a predefined catalog with over 200 measures available in Supply Chain Planning. Although you cannot modify the default measure catalog, you can create a custom measure catalog, modify the list of measures, and assign it to plans on the Plan Options page.

## Levels and Attributes

### Levels and Attributes: Explained

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

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

## Configuring Planning Analytics: Procedures

For supply and demand plans to run successfully, you must set up dimensions and dimension catalogs, measure catalogs, and levels and attributes. You can open the Configure Planning Analytics task from one of the Supply Chain Planning work areas. Depending on your security privilege, you can also open the Configure Planning Analytics page from the Setup and Maintenance work area.

To configure planning analytics:

1. In the Navigator, click one of the Supply Chain Planning work areas or Setup and Maintenance work area.
2. If you've clicked one of Supply Chain Planning work areas, then click the **Tasks** panel tab. In the **Tasks** panel drawer, click the **Configure Planning Analytics** link.
3. If you've clicked the Setup and Maintenance work area, then click the Value Chain Planning offering. On the Value Chain Planning offering page, click Setup and then click the Value Chain Planning Configuration functional area. Click the **Configure Planning Analytics** link from the Task list.
4. On the Configure Planning Analytics page, Dimension Catalogs tab, do the following:
  - a. Create a dimension catalog.
  - b. Specify what hierarchies to use in the dimension catalog.
  - c. Assign the dimension catalog to a plan that will use the set of hierarchies for analysis.

Default Catalog is the name of the predefined dimension catalog. It contains predefined hierarchies.

5. Click the Measure Catalogs tab to define a measure catalog with a set of measures.

After you create and define a measure catalog, you can select the measure catalog for a plan from the Edit Plan Options page.

6. Click the Levels and Attributes tab.
7. Search for a dimension and hierarchy:
  - a. In the **Dimension** drop-down list, select a dimension.
  - b. Optionally, in the **Hierarchy** drop-down list, select a hierarchy.
  - c. Click the **Search** icon button.
8. To change how the level name appears in pivot tables and graphs, select the row and enter the level name in the editable **Display Override** field.

 **Note:** You cannot edit the **Display Override** field for the lowest level of the hierarchy.

9. To add an attribute:
  - a. In the row for the lowest level of the hierarchy, click the **Edit Page** icon in the **Attributes** column.
  - b. In the **Manage Attribute List** dialog box, click the **Add Row** icon.
  - c. In the **Attribute** drop-down list, select an attribute.
  - d. In the **Attribute Label** text box, enter a label name.
  - e. Click **OK**.
10. On the Levels and Attributes tab, click the **Save and Close** button.



# Glossary

## **order orchestration and planning data repository**

The set of data collected from source systems and stored for use by order orchestration, order promising, and supply chain planning processes. Also known as the planning data repository.

## **planning data repository**

The set of data collected from the Oracle Fusion source system, or loaded from files, and stored for use by Oracle Fusion Planning Central, Global Order Promising, and Order Management processes.

