**Oracle Demand Planning:
Student Practices**

ORACLE®

Author

Stephen Bernard

Technical Contributors and Reviewers

Boon Chua, William Craven, Auroop Ganguly, Vikash Goyal, Carly Higdon, Phill Hubis, Nile Leach, Liz McCormally, John Paramore, Mary Pea, Sean Smith

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Chapter 1

Student Practices: Practice Number 1

In this practice, we will review the application setups on the Planning Server.

Reviewing Setups

1. Log in to the Oracle Demand Planning application. Your instructor will provide the appropriate Web address, username, and password for the Demand Planning Server.

2. Select the responsibility: **Demand Planning Integration Administrator.**

3. Navigate to the Dimensions window: (**N) Setup > Dimensions.**

4. List all the dimensions defined on this screen:

   _____   _____

   _____   _____

   _____   _____

   _____   _____

5. Navigate to the User Dimensions window: (N) Setup > User Dimensions.

6. List all the dimensions defined on this screen

   _____   _____

   _____   _____

   _____   _____

   _____   _____

7. Are the dimensions and user dimensions the same?_____

8. Navigate to the Hierarchies window: (N) Setup > Hierarchies

9. Which dimension has no hierarchy?_____

10. Draw a pictogram depicting the hierarchy levels of the Product Category hierarchy:

Practice Number 2

In this practice, we will review the setup of an existing demand plan.

Reviewing the Setup for an Existing Demand Plan

1. Log in to the Oracle Demand Planning application. Your instructor will provide the appropriate Web address, username, and password for the Demand Planning Server.

2. Select the responsibility: Demand Planning System Administrator.

3. Navigate to the Demand Plans window: (N) Integration > Demand Plan Definitions > Demand Plans.

4. In the inventory organization TST:M1 TST:Seattle Manufacturing, select the demand plan name M1-ODP-PLAN1.

5. List the unique user dimensions for this demand plan:

   _____   _____

   _____   _____

6. Which dimensions have been consolidated into the Geography dimension?

   _____   _____   _____

7. Navigate to the **Demand Plan Hierarchies** window. List the hierarchies for the Product dimension:

   _____

   _____

8. Return to the **Demand Plans** window.

9. Navigate to the **Demand Plan Scenarios** window. Note the scenario name for this plan:

   _____

10. List the following information for the scenario:

    Output period type   _____

    Planning horizon start and end dates   _____   _____

Type of history data forecast is based on _____

11. Navigate to the **Scenario Output Levels** window. At what hierarchy level within the Product dimension will this forecast be published?

    _____

12. Return to the **Demand Plans** window. Navigate to the **Input Parameters** tab of the **Demand Plan Parameters** window. What is the type of the input data, and what date range of history is input?

    Name _____

    Start date _____

    End date _____

13. Select the **Output Parameters** tab. What is the name of the scenario that will be published back to the Planning Server from the shared Express server?

    Name _____

    What is the history date range that will be used for calculating the forecast?

    History start date _____

    History end date _____

Practice Number 3

In this practice, we will define a new demand plan on the Planning Server.

Defining a New Demand Plan

1. If you are not already signed on, log in to the Oracle Demand Planning application. Your instructor will provide the appropriate Web address, username, and password for the Demand Planning Server.

2. Select the responsibility: **Demand Planning Integration Administrator**

3. Navigate to the Dimensions window: **(N) Demand Plan Definitions > Demand Plans**

4. Select the organization: **TST:M1 TST:Seattle Manufacturing**.

5. Select any demand plan from the list provided. The Demand Plans window is displayed.

6. Click the **New** icon or select New from the File menu to begin creating a new demand plan.

7. Create a plan with **ODP PLAN** as the plan name. Repeat your plan name as the description.

8. Insert a base UOM of **Ea**

9. Insert a calendar type of **Gregorian**

10. Insert a history start of **January 1, 1999**

11. Select a minimum of three dimensions/user dimensions from the list of values. (Which two dimensions are mandatory?)

12. Click the **DP Hierarchies** button. Insert DP hierarchies for each dimension as required. Which dimension requires no hierarchy? Why?

13. Save your record.

14. Return to the **Demand Plans** window.

15. Define one or more scenarios for your plan.

16. Click the **DP Scenarios** button.

17. Select a scenario name and enter a description for your plan.

18. Click the List of Values button in the Output Period Type field. Which values are displayed?

_____   _____   _____ _____

19. Select any value for Output Period Type.

20. Input a Horizon Start and End Date.

21. Select any value for Forecast Based on and Forecast Period Type.

22. Click the Output Levels button. Assign output levels to each dimension as required.

23. Return to the Demand Plans window.

24. Click the DP Parameters button.

25. Complete the following fields on the **Input Parameters** tabbed page:

Type: _____

Start Date: _____

End Date: _____

Forecast by: _____

26. Complete the following fields on the **Output Parameters** tabbed page:

Output Scenario: _____

History Start:_____

History End:_____

27. Save your record.

Practice Number 4

In this practice, we will work with predefined and ad hoc reports and graphs.

Viewing and Modifying a Predefined Report

1. Select the Demand Planner, Vision Operations Responsibility

2. Select the M1-ODP-PLAN1 demand plan. Click the Start Demand Planning button.

3. Double-click the Documents folder, then double-click any of the subfolders to display the available reports. Double-click the Trend button, then double-click the Geography Trend report. After a few moments, the report will open in the upper region.

4. Size the windows to show the entire report.

5. Scroll to the bottom of the screen to show the Display Settings area.

6. Click the Shipping History: Date Shipped, Amount link.

7. Select Shipping History:Date Shipped, Quantity.

8. Click the "from" date link and change it to 15-Jan-2000.

9. Hint: Use the Binoculars icon to find the date that you want.

10. Click the "to" date link and change it to 01-Feb-2000.

11. Click the "display as" report link and change it to graph.

12. Click the Run button to submit the new report parameters.

Creating a Folder

1. In the Navigation tree space, click the **New** icon (the farthest icon to the left).

2. Select **New Folder**. Enter **My Folder**.

Creating an Ad Hoc Report

1. Click the **New** icon in the **Navigate** window and select **New Report**.

2. Select **Use default** and click **OK**.

3. After the report is displayed, select the **Measure** pull-down menu and show the three options that are currently selected.

Modifying an Ad Hoc Report

1. In the toolbar in the upper part of the report region, click the three-dimensional cube icon. With this tool you can select the options available to view data.

2. Select **Measure** and add the measures that are not currently added to the cube by highlighting them in the available box and clicking the right arrow to move them into the selected box. Click the double right arrows to select all available measures at once. The end result should be that all measures are added and made available.

3. Select Product and make all of the products available. Click OK to close the three-dimensional cube and add those options to your report. You might have to resize columns so that all the data is visible.

4. In the report's Measure pull-down menu, select Shipping History:Date Shipped, Quantity.

5. The report should now be showing quantities for all of the products. Products and Time should be the names of the rows on the left and Geography and Organizations should be the names of the columns across the top.

Changing the Layout of the Data

Select the Products Column by clicking the **...** selector at the top of the column. Drag the column and place it under (after) the organization row. Alternately, you can use the **Change Layout** icon. This is the second icon in the upper region toolbar. Click the icon and select **Product** from the first pull-down menu, select the **after** option button, then select **Geography** from the last pull-down menu.
Color-Coding the Data

1. Click the stoplight icon in the toolbar. With this tool you can color-code data cells based on a condition that you define.

2. Select **Shipping History:Date Shipped, Quantity**. Click the **Next** button.

3. Define the condition. Select by = **value**, where = **Shipping History:Date Shipped, Quantity,** is = **less than**, the Value = **60000**.

4. Click the **Next** button.

5. Select the change of color. Clear the Use default check box."

6. Click the font color palette and select **Red**.

7. Click the **Next** button.

8. Name the Rule **Less than 60000**.

9. Click **Finish**. Accept the rule. Click **OK**.

10. Click the Save icon. Save the report as US Quantity History into My Folder.

11. Do not select **Save as Default**.

Creating an Ad Hoc Graph

1. Click the **New** icon in the **Navigate** window and select **New Graph**.

2. Base your graph on the report that you just created.

3. Select the **Based on** option button and select **US Quantity History**.

4. As you sweep your mouse along the titles at the base of the graph, notice how the pop-up window changes from Drill Down (+) on the left side of the box to Drill Up (-) on the right side of the box. Click the appropriate side of the box to drill up or drill down.

5. Click the **Save** icon. Save the graph as **US Quantity History Graph** into **My Folder**. Do not select **Save as Default**.

Practice Number 5

In this practice, we will use worksheets to modify data.

Creating a Baseline Forecast Report

1. Click the **New** icon in the **Navigate** window and select **New Report**.

2. Select **Use default** and click **OK**.

3. Click the three-dimensional cube icon. Select the **Measure** for **Baseline Forecast: M1-ODP-PLAN1-A, Quantity** and **Baseline Forecast: M1-ODP-PLAN1-A, Amount**. Click **OK**.

4. In the **Measure** pull-down list, select **Baseline Forecast: M1-ODP-PLAN1-A, Quantity**.

5. Click the **Save** icon. Save the report as **Baseline Forecast** into **My Folder**.

6. Do not select **Save as Default**.

Creating Worksheets

1. Click the **New** icon in the **Navigate** window. Select **New Worksheet.**

2. Base the worksheet on the **Baseline Forecast** report you just created.

3. Click **OK**. You will probably have to resize the worksheet window.

4. Click the three-dimensional cube icon in the lower region toolbar. Select **Measure**.

5. Deselect all of the current data in the **Selected** box except **Baseline Forecast: M1-ODP-PLAN1-A, Quantity**.

6. Select **Product.** Select all of the products by clicking the double-arrow button.

7. Select **Time**. Limit the time frame. Deselect the time frames of **1998 & 1999,** leaving only the year **2000**. Click **OK**.

8. Click the **Save** icon. Save the worksheet as **2000 Baseline Forecast** into **My Folder**. Do not select **Save as Default**.

9. Click the **New** icon in the **Navigate** window. Select **New Worksheet.**

10. Base the worksheet on the **2000 Baseline Forecast** worksheet that you just created. Click **OK**.

11. You will probably have to resize the worksheet window.

12. Click the three-dimensional cube icon in the lower region toolbar.

13. Select Product. Deselect all of the current data in the Selected box and then select 01 PC. Click OK.

14. Expand the time frame. Select the year 2000. Then select quarters 3, 2, and 1.

15. If you like, you could expand the months to show the days of the month.

16. Click the Save icon. Save the worksheet as PC Only 2000 Baseline Forecast into My Folder. Do not select Save as Default.

Creating a Forecast

1. Click the **New** icon.

2. From the drop-down menu, select **New Forecast**.

3. A New Forecast window opens.

4. Select the **Create Forecast** button.-A Create Forecast window opens.

5. Enter a name for your adjusted forecast: **All Customer Forecast**.

6. On the **Forecast Method** tabbed page, change the forecast method from **Automatic** to **Linear Regression**.

7. Click **OK**.

8. When the **Create Forecasts** window closes, open the **Forecasts** folder to verify that your new forecast is stored in that location.

Practice Number 6

In this practice, we will create custom measures that use the sales (baseline) forecast and the customer forecast.

Creating Custom Measures

1. Click the **New** icon. Select **New Custom Measure**.

2. Enter a Short Name and Long Name of **Average**, and select **Sum** as the Type**.**

3. You are going to select two different measures to create a custom measure. Using the [Ctrl] key and mouse, select the following two measures:
   Baseline Forecast: M1-ODP-PLAN1-A, Quantity, and **All Customer Forecast, Quantity**.

4. In the Additional Calculation box select the **"/ "** sign for division, then enter **2**.

5. Review the measure in the display.

6. Click **OK** when done.

7. Click the **New** icon. Select **New Custom Measure**.

8. Enter a Short Name of **Sales-Customer**.

9. Enter a Long Name of **Difference Between Sales and Customer Forecast**.

10. Select **Difference** as the Type.

11. The Measure is **M1-ODP-PLAN1-A, Quantity**.

12. The Measure to Subtract is **All Customer Forecast, Quantity**.

13. Review the measure in the display.

14. Click **OK** when you are done.

Practice Number 7

In this practice, we will create a custom alert to enable users to receive notifications of data meeting exception conditions.

Creating an Alert

1. Click the **New** icon. Select **New Alert**.

2. The Alert Wizard is displayed.

3. Define the exception condition.

    Select Geography

    within Geography:Country

    by Value

    where Difference between Sales and Customer Forecast

    is greater than

    the value 100

4. Click Next.

5. Complete the selector form.

6. Select Geography. Click the Selector button.

7. Select all by clicking the double-arrow button, then click OK.

8. Select Ship From Location. Click the Selector button.

9. Select all by clicking the double-arrow button, then click OK.

10. Select Product. Click the Selector button.

11. Select all by clicking the double-arrow button, then click OK.

12. Click on Time. Click on the Selector button and collapse the options by clicking the Double Minus button. Deselect any existing entries in the Selected box.

13. Select the year 2000. Click OK. Click Next.

14. Define who will receive the messages.

15. Select Jonathan Smith and click the > button.

16. Define the delivery priority as Standard or High.

17. Define the subject as Sales-Customer >100. The subject will be the alert name in the Alerts folder after you save this Alert.

18. Enter the content of the message. Click Next.

19. Select Immediate notification.

20. Click Finish.

21. Double-click the alert in the Notifications area to display it.

Practice Number 8

In this practice, we will go through the forecasting process, including viewing a baseline forecast, copying a forecast, creating and modifying a forecast, submitting a forecast to the shared Express database, and managing forecasts in the shared Express database.

Viewing a Baseline Forecast

1. In the **Navigate** window, open the **Forecasts** folder.

2. Double-click **Baseline Forecast: M1-ODP-PLAN1-A**.

3. The **View Forecast** window opens.

4. Look up the following properties:

   Scenario name: _____

   History type and name of history used: _____ : _____

   Forecast method used for baseline: _____

   Forecast level for the Product dimension: _____

5. Which allocation rule is used?

   ___ Allocate based on forecasted weights aggregated from the lowest level.

   ___ Allocate based on a forecast at each level.

   ___ Allocate based on historical weights for the last *n* periods.

6. Close the **View Properties** window.

Copying a Forecast

1. Click the **New** icon. Select **New Forecast** from the drop-down menu. The New Forecast window opens. Select the **Copy Forecast** button.

2. Enter a new name for the copy of the baseline forecast: **COPY:Baseline Forecast: M1-ODP-PLAN1-A**.

3. Select **Baseline Forecast: M1-ODP-PLAN1-A** as the forecast to copy from. Click **OK**.

4. After the process is completed, the Demand Planning Alert window automatically closes.

5. Open the **Forecasts** folder.

6. Your new forecast name appears there.

7. Double-click your new forecast name to view its properties.

8. Close the View Properties window.

Modifying a Forecast

1. Click the **New** icon. From the drop-down menu, select **New Worksheet**. A New Worksheet dialog box opens. Accept **Use default** and click the **OK** button.

2. A worksheet opens at the bottom of the page. Increase the width of the columns so that you can see the complete column headings.

3. Click the three-dimensional cube icon Select **Measure**. Remove all measures from the list and add the forecast that you created in the previous step, **COPY:Baseline Forecast: M1-ODP-PLAN1-A,** to the list. Click **OK**.

4. In the **Product** dimension, select item number **01 PC**. For the **MAR-2000 All Geography**,

5. **All Organization** cell, change the forecast quantity to **33,333**.

6. With the field highlighted, click the **Comment** icon. In the **New Comment** field, enter a comment. Click the **Add** button. Click the **OK** button.

7. What text format is used to indicate that a forecast has been changed?
   _____

8. Right-click the changed cell. Select Comment to view the comment that you just entered.

9. Save your modified forecast into your document folder.

Submitting a Forecast

Because the data assignments overlap, the instructor will demonstrate the procedure for submitting a forecast to the Express shared database.

Managing Forecasts

1. Your instructor will demonstrate the Planning Manager responsibility.

2. The information on this page references the Express shared database that includes data submitted from all assignments. The procedures for viewing and adjusting data from the Demand Plan Manager window are the same as those from the Demand Planner window. Ordinarily only one person would hold management responsibility for the forecast scenarios within one demand plan.

Note that the Planning Manager works **directly** in the Express shared database. Therefore, any changes made to a forecast scenario through a worksheet instantly updates the data when the worksheet is saved.