Oracle Supply Chain Planning Cloud

Interoperability of Oracle Sales and Operations Planning (S&OP) Cloud in Oracle Supply Chain Planning Cloud using Load Measures from Other Plans
# Table of Contents

- **Introduction** ........................................................................................................................................... 3
- S&OP Cloud Interoperability Flows within Supply Chain Planning Cloud ............................................ 4
- Prerequisites for using Load Measures from Other Plans ................................................................. 9
- Things to consider when using Load Measures from Other Plans .................................................. 9
- Process Steps for loading measure data from Demand Management (DM) to S&OP Cloud (S&OP) 14
- Process Steps for loading measure data from Supply Planning (SP) to S&OP Cloud (S&OP) .......... 21
- Process Steps for loading measure data from Demand and Supply Planning Cloud (ISD) or Planning Central Cloud (PC) to S&OP Cloud (S&OP) ................................................................. 30
- Process Steps for loading measure data from S&OP Cloud to Demand Management .................... 32
Introduction

The best Sales and Operations Planning (S&OP) process is of limited use if there is a disconnection with your tactical planning processes. Oracle Sales and Operations Planning (S&OP) Cloud integrates with its tactical supply chain planning solutions, so that your S&OP process starts with the latest tactical plans, and once you approve a new S&OP plan, it feeds into your tactical planning systems for execution.

Connect S&OP decisions with overall business planning by:
- Linking tactical planning with S&OP
  - Copy measure data from Planning Central, Demand Management, and Supply Planning plans into Sales and Operations Planning plans
- Driving accountability by pushing S&OP decisions into tactical planning and execution applications
  - Use the demand forecast from a Sales and Operations Planning plan as a demand schedule in Planning Central and Supply Planning
  - Use demand forecasts from a Sales and Operations Planning plan to augment forecasting in a Demand Management plan
- Staying on track by continuously monitoring your S&OP plans

The Load Measures from Other Plans task is available in the S&OP Cloud (and Demand Management) work area. This task enables the interoperability between a Sales and Operations Planning plan and Planning Central, Demand Management, and Supply Planning plans. From the list of available measures that are in common between the source plan and target plan, you can select which measures to copy data. After copying measure data, you can analyze aggregate data in S&OP Cloud and take correction action.
S&OP Cloud Interoperability Flows within Supply Chain Planning Cloud

This section provides an overview of the typical integrated flows for S&OP Cloud within Supply Chain Planning Cloud. Detailed steps for each of these flows are provided later on in this document. In particular, how to use the Load Measures from Other Plans task to copy measure data to and from your S&OP plans.
The following summarizes the flow from Demand Management (DM) to S&OP:

- Run the demand plan to generate statistical forecasts using the latest sales history data in the DM work area.
- Review and adjust the shipments and bookings forecasts in the demand plan.
- In the S&OP work area, load the statistical and adjusted demand measures from the demand plan to a sales and operations plan using the Load Measures from Other Plans task.
- Review and adjust the consensus forecast in the S&OP plan.
- Run the sales and operations plan (do not refresh data) using the latest demand plan data.
- Review and adjust the operating plan in the S&OP plan. Re-run the sales and operations plan (do not refresh data).
- Approve the S&OP plan for the planning cycle.
- In the DM work area, load the approved consensus forecast measure from the approved sales and operations plan to the demand plan using the Load Measures from Other Plans task. Use the approved consensus forecast as a reference measure in the demand plan.

Go to Process Steps for loading measure data from DM to S&OP
Supply Planning Cloud (SP) to Sales and Operations Planning Cloud (S&OP)

The following summarizes the flow from Supply Planning (SP) to S&OP:

- Run the supply plan using the latest collected data in the SP work area and the approved consensus forecast (from the prior S&OP planning cycle) as a demand schedule.
- In the S&OP work area, load supply measures from the supply plan to a sales and operations plan using the Load Measures from Other Plans task.
- Review and adjust the consensus forecast in the S&OP plan using the latest tactical, supply plan data.
- Approve the S&OP plan for the planning cycle. This copies the latest Consensus Forecast measure data into the Approved Consensus Forecast measure.
- In the SP work area, run the supply plan using the approved consensus forecast measure in the approved sales and operations plan from the current S&OP planning cycle as a demand schedule.

Go to Process Steps for loading measure data from SP to S&OP
The following summarizes the flow between Demand and Supply Planning (ISD) or Planning Central (PC) and S&OP:

- Run the demand and supply plan using the latest collected data.
- In the S&OP work area, load the demand and supply measures from the demand and supply plan to a sales and operations plan using the Load Measures from Other Plans task.
- Review and adjust the consensus forecast in the S&OP plan using the latest tactical, demand and supply plan data. The Final Shipments Forecast blends into the weighted forecast.
- Run the sales and operations plan (do not refresh data).
- If necessary, reload supply measures from the demand and supply plan to the sales and operations plan.
- Approve the S&OP plan for the planning cycle.
- Run the demand and supply plan using the approved consensus forecast measure as a demand schedule.
  
  *Note:* This is the non-CTO flow. Refer to the next section for the CTO flow.

- Additionally, in the Demand and Supply Planning work area, load the approved consensus forecast measure using the Load Measures from Other Plans task. We do not enable this step for Planning Central.

Go to Process Steps for loading measure data from Demand and Supply Planning to S&OP
Sales and Operations Planning Cloud (S&OP) to Demand Management Cloud (DM) - Configure-to-Order (CTO)

The following summarizes the Configure-to-Order (CTO) flow from S&OP to Demand Management (DM) and Supply Planning (SP):

- Complete the Demand Review stage of the planning cycle.
- Approve the S&OP plan.
- In the DM (or Demand and Supply Planning) work area, load demand forecast measures from the sales and operations plan to a demand plan (or demand and supply plan) using the Load Measures from Other Plans task.
- Review and adjust the shipments and bookings forecasts that incorporate the loaded forecasts in the demand plan. Review planning percentages by model and option.
- Approve the DM plan.
- In the SP work area, run the supply plan using the approved demand forecast measure in the approved DM plan as a demand schedule.

[Go to Process Steps for loading measure data from S&OP to DM]
Prerequisites for using Load Measures from Other Plans

This is a list of prerequisites for using the **Load Measures from Other Plans** task to copy measure data to/from Sales and Operations Planning Cloud:

- Both the source plan and target plan have run successfully.
- Private plans are available if the user has access to them.
- Measures must belong to the measure catalogs for both the source plan and target plan. This includes the dependent measures used in a measure expression. This is applicable to both predefined and user-defined measures.
- Data combinations must reside in the target plan for the measures that will copied. The Load Measures process does not insert new combinations.
- You need to have the MSC_LOAD_MEASURES_FROM_OTHER_PLANS_PRIV privilege in order to access.

Things to consider when using Load Measures from Other Plans

Before using the **Load Measures from Other Plans** task, here are some things to consider:

- You need to load measure data (i.e. overlay) into a valid plan. Therefore, in general, you should run a baseline plan with Data Refresh Options = ‘Refresh with current data’ and overlay data into that plan or into a duplicate plan.
- After loading measure data from other plans, running a Sales and Operations Plan even with Data Refresh Options = ‘Do not refresh with current data’ can override the loaded data. For example:
  - You load Shipments Forecast measure data from a Demand Plan and then run the Forecast Shipments forecasting profile in S&OP. If you load the Shipments Forecast from a Demand Plan then run the plan with ‘Plan demand’ = No in Scope Options. The ‘Plan demand’ = No setting in Run Plan Options will not invoke the demand forecasting engine.
  - You load Constrained Forecast and Production Plan measure data from a Supply Plan and run the plan with ‘Plan supply’ = Yes in Scope Options. It might be necessary to reload measure data from the Supply Plan.
- Demand measures such as Shipments Forecast and Sales Forecast have the measure property ‘Refresh with current data’. When running a plan with Data Refresh Options = ‘Refresh with current data’ then the system purges their measure values. You must consider which measure forecast to use for your aggregate supply planning in S&OP. You can use the followings measures as a demand schedule in an S&OP plan:
  - Consensus Forecast (default)
  - Approved Consensus Forecast
  - Final Sales Forecast
  - Final Marketing Forecast
  - Final Shipments Forecast
  - Final Bookings Forecast
Approved Final Shipments Forecast
Approved Final Bookings Forecast

By default, the Consensus Forecast uses the full weight of the Final Shipments Forecast. If you are loading the Shipments Forecast from a Demand Plan then consider the following flow:

- At the start of an S&OP planning cycle, run the baseline Sales and Operations Plan with Data Refresh Options = ‘Refresh with current data’ using the Approved Consensus Forecast from the prior cycle as the demand schedule.
- Duplicate the baseline plan.
- Use Load Measures from Other Plans to load the latest Shipments Forecast (and/or Bookings Forecast) maintained in a Demand Plan into the duplicate S&OP plan.
- Run the duplicate plan with Data Refresh Options = ‘Do not refresh with current data’ and 'Plan demand' = No in Scope Options. **Note:** This simulation flow is available starting in 18A.

- Supply measures such as Constrained Forecast and Production Plan have the measure property ‘Refresh with current data’. When running a plan with Data Refresh Options = ‘Refresh with current data’ then the system purges their measure values. If you are loading supply measure data from Supply Plan(s) then you need to load after the plan runs.

- Are you using the aggregate supply planning engine for rough-cut capacity planning in S&OP?
  - If you intend to use the aggregate supply planning engine for rough-cut capacity planning in S&OP then set ‘**Plan supply**’ = Yes in the Supply tab of plan options.
  - If you load tactical supply measure data without running the aggregate supply planning engine in S&OP then set ‘**Plan supply**’ = No in the Supply tab of plan options.
Note: If you specify an Assignment Set in the Supply tab of plan options and then uncheck ‘Plan supply’ then suppliers are included in the plan.

- A Bill of Resources (BOR) is still required for supply planning in S&OP even when you do not use the aggregate supply planning engine. The BOR is used to create data combinations in an S&OP plan to identify the critical items and resources in your operations. It also ensures manufacturing structure is available for reports using this structure such as the Aggregate Build Plan table (available in 18B) to enhance reporting by end item.

Clarification: You need a BOR in order to analyze loaded resource capacity data such as Resource Requirements when ‘Plan supply’ = No in the Supply tab of plan options. If you plan to analyze loaded measure data for item and organization combinations then you need to include their parent categories in Plan Items in the Scope tab of plan options. If you include component (and sub-assembly) categories in Plan Items then the Items table will include their items and you do not need to associate component items in a BOR.
You need to consider the differences between the plan horizons of tactical and strategic plans and the planning time level in S&OP.

Data is copied for overlapping periods between source and target plans. No data is copied if there is a misalignment in time range for these plans.

There is no planning time fence in S&OP so even running a simulation plan will overwrite measure data loaded for engine output measures.

- The **Planning Time Level** and **Planning Calendar** used in your demand plan options must align with your S&OP plan options.
  - If your demand plan has Planning Time Level = Day (default) then there are no concerns.
  - If your demand plan has Planning Time Level > Day then you must ensure there is an alignment between the Planning Time Level and Planning Calendar options used in both the demand and S&OP plans. For example, a demand plan with Planning Time Level = Week and an S&OP plan with Planning Time Level = Month are incompatible.

- Measure data for more than one source plan can be loaded into a single S&OP plan. However, you will need to submit separate jobs for each source plan.

- You must run a plan (without data refresh) **if** you want to generate exceptions after loading measure data from other plans. A plan run is required to generate exceptions.

**Tip**: If your S&OP process does not use the demand forecasting engine nor the aggregate supply planning engine then you can still generate exceptions. Select ‘Plan demand’ in Scope Options and do not include a forecasting profile. Click ‘Yes’ for the warning message that appears in order to proceed. The run plan process skips ahead to the ‘Detecting exceptions’ step.
There is no support in the Load Measures from Other Plans process to/from S&OP Cloud for the following types of measures:
  - Shared measures such as Shipments History and Bookings History.
  - Archive measures such as Consensus Forecast Change and Prior Consensus Forecast.

There is limited support in the Load Measures from Other Plans process to/from S&OP Cloud for the following types of measures:
  - Measures using weighted average for aggregation such as Change to Sales Forecast Percentage, Change to Consensus Forecast Percentage, Final Shipments Forecast Weight, and Final Sales Forecast Weight.
  - Measures with expressions dependent on measures using weighted average for aggregation. For example, Consensus Forecast is a weighted forecast dependent on measures using weighted average measures. When copying from S&OP Cloud to Demand Management Cloud, ensure the Planning Time Level and Planning Calendar used in both the source and target plans are the same.

The following list of bugs that apply to the Load Measures from Other Plans process:
  - BUG 26982867 - DEMAND PLAN RUN DELETES THE DATA FROM APPROVED MEASURES
Currently, approval measures such as Approved Final Shipments Forecast and Approved Consensus Forecast are purged when running a plan with Data Refresh Options = ‘Refresh with current data’. The fix resolves this issue by preserving approval measures through data refresh.

- BUG 25472110 - R13:SOP:OALST0A UNLCK - CONSTRAINED FCST DOES NOT GET COPIED SOP TO DM PLAN
  You cannot copy output measures from the aggregate supply planning engine that are dimensioned by Demand Class such as Constrained Forecast and Net Demand. The engine does not plan at the demand class level. It uses aggregated measure data across demand classes. Currently, you cannot copy these measures from S&OP Cloud to Demand Management Cloud.

- BUG 26485906 - BRONZE 17.11A UNLCK : SALES ORDERS LOAD MEASURES PROCESS AND DEMAND CLASS
  The aggregate supply planning engine does not consider supply measure values loaded from other plans when running plan simulations. For example, when loading Sales Orders, On Hand, Work Orders, and Resource Availability measures from Supply Planning, the engine does not consider these updated data values in the plan simulation. However, S&OP Cloud supports loading demand forecasts from other plans and running plan simulations.

- BUG 27178936 - SCPR13: UNABLE TO COPY DATA FROM SOP TO DM WHEN THERE ARE NO BUCKETS IN DM
  As a workaround in the near-term, you can create and load a custom measure with data for the missing time buckets using the Supply Chain Planning Measures template (ScpMeasuresImportTemplate.xlsm). Use the Load Planning Data from Files task to upload a ZIP file containing the CSV measure data generated from this seeded file-based data import template.

**Process Steps for loading measure data from Demand Management (DM) to S&OP Cloud (S&OP)**

If your S&OP process starts with the latest demand plans then you can load measure data from Demand Plans to Sales and Operations Plans.

![Diagram](image)
The S&OP consensus forecasting process combines multiple stakeholder forecasts that include the Final Shipments Forecast, Final Sales Forecast, and Final Marketing Forecast. By default, the Consensus Forecast measure is equal to the Final Shipments Forecast. The Final Shipments Forecast (or Final Bookings Forecast) from Demand Management incorporates new product forecasts, multiple causal factors, event activity modeling, and exception management to detect performance gaps and improve forecast accuracy. Therefore, it makes sense to load the latest demand forecasts from your Demand Plan into your Sales and Operations Plan.

1. Ensure the following measures belong to the measure catalogs used by Demand Plans and Sales and Operations Plans:
   - Shipments Forecast
   - Adjusted Shipments Forecast
   - Bookings Forecast
   - Adjusted Bookings Forecast
   Manage measure catalogs by using the **Configure Planning Analytics** task.

2. (Optional) Add other predefined and/or user-defined measures in the measure catalogs you use in both the source Demand Plan and the target Sales and Operations Plan. Manage measure catalogs by using the **Configure Planning Analytics** task.
   Additionally, you must select the **Include measure in the Common Measures group** checkbox when creating a user-defined measure in **Manage Planning Measures**.

3. Run both the source Demand Plan and target Sales and Operations Plan. Ensure both run successfully.

4. In the Sales and Operations Planning work area, select the **Load Measures from Other Plans** task to copy measure data from your Demand Plan to your Sales and Operations Plan.
5. Select a **From Plan** (source plan name) and then a **To Plan** (target plan name). The **From Plan** list includes Demand Plans, Supply Plans, and Demand and Supply Plans. The **To Plan** list includes Sales and Operations Plans.

After selecting the source and target plans, the list of **Available Measures** displays the measures in common between their measure catalogs.

6. Find measures by entering measure names and clicking **Find**. Select measure(s) from the filtered list and click on **Move** to shuttle from **Available Measures** to **Selected Measures**. This list should include the following measures:

   - Shipments Forecast
   - Adjusted Shipments Forecast
   - Bookings Forecast
   - Adjusted Bookings Forecast
7. Click on the **Submit** button to launch the scheduled process.

You can monitor plan status by selecting the **View Status Details** plan action.

You can monitor the **Load Measures from Other Plans** job by using the **Scheduled Processes** task. The **Log** attachment summarizes the plans and measures used in the process.
8. Review user-defined reports to validate the process.
9. Repeat steps 4-8 for each Demand plan if there are multiple source plans. Additionally, select additional measures for the same source and target plans.
When returning to the **Load Measures from Other Plans** page, another folder appears in **Available Measures.** My **Measures** folder displays the last set of selected measures.

10. Incorporate the Final Shipments Forecast (or Final Bookings Forecast) into the Consensus Forecast in your Sales and Operations Plan. Review and adjust the relative weights of the stakeholder forecasts using measures such as Final Shipments Forecast Weight.

11. Use the Consensus Forecast coming from your Demand Review in your Supply Review process.

12. Run your Sales and Operations Plan using the updated demand. When running the Sales and Operations Plan, specify the following Run Plan Options:
   i. Data Refresh Options = ‘Do not refresh’
   ii. Scope Options = ‘Plan supply’ only

13. Create alternative plan(s) to consider in which the operating plan is feasible given supply constraints and financial performance targets.

14. Re-run your Sales and Operations Plan(s). When running the Sales and Operations Plan, specify the following Run Plan Options:
   i. Data Refresh Options = ‘Do not refresh’
   ii. Scope Options = ‘Plan supply’ only

15. Compare S&OP plans to decide which plan is best for the planning cycle.

16. If you have a formal approvals process then review and approve your Sales and Operations Plan. The **Approve** plan action copies the **Consensus Forecast** to the **Approved Consensus Forecast**.

17. (If Supply Planning uses the latest approved consensus forecast from S&OP) Use the demand forecast from your Sales and Operations Plan as a demand schedule in your
Supply Plan(s). Select either the **Consensus Forecast** or the **Approved Consensus Forecast**.

18. Use the approved consensus forecast as a reference measure in Demand Management. In the DM work area, load the **Approved Consensus Forecast** measure from the approved sales and operations plan to the demand plan using the Load Measures from Other Plans task.

If your demand management process uses the **Approved Consensus Forecast** then refer to [Process Steps for loading measure data from S&OP Cloud](#).

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**Process Steps for loading measure data from Supply Planning (SP) to S&OP Cloud (S&OP)**

If your S&OP process starts with the latest tactical supply plans then you can load measure data from Supply Plans to Sales and Operations Plans.

Some input and output measures in Supply Plans are not used *directly* in Sales and Operations Plans for aggregate supply planning. The **Planned Orders** measure in a Supply Plan represents make and buy planned orders whereas aggregate planning in Sales and Operations Planning flushes data to the **Production Plan** and **Purchases** measures. However, you can add the **Planned Orders** measure to your S&OP measure catalog and use the **Load Measures from Other Plans** task to copy over data from Supply Planning.

The default **Total Demand** and **Total Supply** measures in S&OP have expressions that depend upon other measures rather than displaying the direct output from the planning engine. This is a difference between Supply Planning and S&OP. These predefined expressions reflect a standalone use case primarily. For example, **Total Supply** is equal to the sum of **On Hand**, **Production Plan**, **Purchases**, and **Transfer Orders** measures. To
support an integrated flow with Supply Planning, you can augment the catalog of measures in your S&OP plans.

1. Create a **Tactical Total Demand** user-defined measure using the Manage Planning Measures task in the S&OP Cloud work area.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measure</td>
<td>Tactical Total Demand</td>
</tr>
<tr>
<td>Description</td>
<td>Sum of independent and dependent demands from tactical planning, expressed as a quantity. Applicable to the Sales and Operations Planning work area.</td>
</tr>
<tr>
<td>Data Type</td>
<td>Number</td>
</tr>
<tr>
<td>Include measure in the Common Measures group</td>
<td>No</td>
</tr>
<tr>
<td>Measure Groups</td>
<td>Inventory Analysis</td>
</tr>
<tr>
<td>Allow editing</td>
<td>No</td>
</tr>
<tr>
<td>Dimension Parameters</td>
<td>Granularity 125&lt;br&gt;Selected:&lt;br&gt;Organization (Hierarchy = Enterprise, Stored Level = Organization)&lt;br&gt;Product (Hierarchy = Product, Stored Level = Item)&lt;br&gt;Time (Hierarchy = Gregorian Calendar, Stored Level = Day)</td>
</tr>
<tr>
<td>Aggregate Parameters</td>
<td>Calculation Order = Calculate then aggregate&lt;br&gt;Time Dimension = Sum&lt;br&gt;Other Dimensions = Sum</td>
</tr>
<tr>
<td>Expression</td>
<td><code>nvl(Constrained Forecast,0)+nvl(Sales Orders,0)+nvl(Dependent Demand,0)</code>&lt;br&gt;<code>nvl(Net Forecast,0)+nvl(Sales Orders,0)+nvl(Dependent Demand,0)</code></td>
</tr>
<tr>
<td><strong>Remember to validate the measure expression.</strong></td>
<td></td>
</tr>
<tr>
<td>Advanced - Properties</td>
<td>Refresh with current data = No&lt;br&gt;Decimal Places = 0&lt;br&gt;Shared Measure = No</td>
</tr>
<tr>
<td>Advanced - Goals</td>
<td>High values are better&lt;br&gt;Low Range: From Value = To Value = 0&lt;br&gt;High Range: From Value = To Value = 0</td>
</tr>
</tbody>
</table>
Setting goals enables these measures for use in infotile charts.

**Note:** A shortcut for creating this measure is to duplicate the predefined Total Demand measure in the S&OP Cloud work area.

2. Create a **Tactical Total Supply** user-defined measure using the **Manage Planning Measures** task in the S&OP Cloud work area.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measure</td>
<td>Tactical Total Supply</td>
</tr>
<tr>
<td>Description</td>
<td>Sum of supplies from tactical planning, expressed as a quantity. Applicable to the Sales and Operations Planning work area.</td>
</tr>
<tr>
<td>Data Type</td>
<td>Number</td>
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<tr>
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<td>Measure Groups</td>
<td>Inventory Analysis</td>
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<tr>
<td>Allow editing</td>
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<td>Dimension Parameters</td>
<td>Granularity 125</td>
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<tr>
<td></td>
<td>Selected:</td>
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<tr>
<td></td>
<td>Organization (Hierarchy = Enterprise, Stored Level = Organization)</td>
</tr>
<tr>
<td></td>
<td>Product (Hierarchy = Product, Stored Level = Item)</td>
</tr>
<tr>
<td></td>
<td>Time (Hierarchy = Gregorian Calendar, Stored Level = Day)</td>
</tr>
<tr>
<td>Aggregate Parameters</td>
<td>Calculation Order = Calculate then aggregate</td>
</tr>
<tr>
<td></td>
<td>Time Dimension = Sum</td>
</tr>
<tr>
<td></td>
<td>Other Dimensions = Sum</td>
</tr>
<tr>
<td>Expression</td>
<td>nvl(On Hand,0)+nvl(Planned Orders,0)+nvl(Purchase Orders,0)+nvl(Transfer Orders,0)+nvl(Work Orders,0)</td>
</tr>
<tr>
<td></td>
<td>If using Production Plan (that is equal to Planned Orders + Work Orders)…</td>
</tr>
<tr>
<td></td>
<td>nvl(On Hand,0)+nvl(Production Plan,0)+nvl(Purchase Orders,0)+nvl(Transfer Orders,0)</td>
</tr>
<tr>
<td></td>
<td>Remember to validate the measure expression.</td>
</tr>
<tr>
<td>Advanced - Properties</td>
<td>Refresh with current data = No</td>
</tr>
<tr>
<td></td>
<td>Decimal Places = 0</td>
</tr>
<tr>
<td>Shared Measure = No</td>
<td></td>
</tr>
<tr>
<td>--------------------</td>
<td></td>
</tr>
</tbody>
</table>
| **Advanced - Goals** | High values are better  
Low Range: From Value = To Value = 0  
High Range: From Value = To Value = 0 |

*Note:* A shortcut for creating this measure is to duplicate the predefined Total Supply measure in the S&OP Cloud work area.

3. Ensure the following measures belong to the measure catalog used by Supply Planning plans:
   - Constrained Forecast
   - Sales Orders
   - Dependent Demand
   - On Hand
   - Planned Orders
   - Production Plan
   - Purchase Orders
   - Transfer Orders
   - Work Orders

Manage measure catalogs by using the **Configure Planning Analytics** task in the Supply Planning Cloud work area.

4. Ensure the following measures belong to the measure catalog used by S&OP plans:
   - Constrained Forecast
   - Sales Orders
   - Dependent Demand
   - On Hand
   - Planned Orders
   - Production Plan
   - Purchase Orders
   - Transfer Orders
   - Work Orders
   - Tactical Total Demand
   - Tactical Total Supply
Manage measure catalogs by using the Configure Planning Analytics task in the S&OP Cloud work area.

5. (Optional) Add other predefined and/or user-defined measures in the measure catalogs you use in both the source Supply Plan and the target Sales and Operations Plan. Manage measure catalogs by using the Configure Planning Analytics task.

For example, if the In Receiving measure contains data in your Supply Plans then you can augment the S&OP measure catalog and expression for the Tactical Total Supply measure to include this measure.

Additionally, you must select the Include measure in the Common Measures group checkbox when creating a user-defined measure in Manage Planning Measures.

6. Run both the source Supply Plan(s) and target Sales and Operations Plan. When running the Supply Plan(s), ensure the Save plan to database radio button is set to ‘Save all’ in the Run Plan dialog. Ensure both plan types run successfully.

7. In the Sales and Operations Planning work area, select the Load Measures from Other Plans task to copy measure data from your Supply Plan(s) to your Sales and Operations Plan.

8. Select a From Plan (source plan name) and then a To Plan (target plan name). The From Plan list includes Demand Plans, Supply Plans, and Demand and Supply Plans. The To Plan list includes Sales and Operations Plans.

After selecting the source and target plans, the list of Available Measures displays the measures in common between their measure catalogs.
9. Find measures by entering measure names and clicking **Find**. Select measure(s) from the filtered list and click on **Move** to shuttle from **Available Measures** to **Selected Measures**. This list should include the following measures:

- Constrained Forecast
- Sales Orders
- Dependent Demand
- On Hand
- Planned Orders
- Production Plan
- Purchase Orders
- Transfer Orders
- Work Orders

Consider also including the following measures:

- Resource Requirements
- Resource Availability
- Supplier Capacity Required
- Supplier Capacity Available
- Safety Stock
- Projected Available Balance
- Revenue
- Manufacturing Cost
- Purchasing Cost

Note: In 18C, five additional measures will be available to add to the measure catalog used by S&OP plans, namely Net Forecast, Manual Demand, Scheduled Receipts, Purchase Requisitions, and In Receiving. When available, modify the **Tactical Total Demand** measure expression to use Net Forecast instead of Constrained Forecast.

10. Click on the **Submit** button to launch the scheduled process.

You can monitor plan status by selecting the **View Status Details** plan action.

You can monitor the **Load Measures from Other Plans** job by using the **Scheduled Processes** task. The **Log** attachment summarizes the plans and measures used in the process.
11. Review user-defined reports to validate the process.

Before loading measures
After loading measures

12. Repeat steps 7-11 for each Supply plan if there are multiple source plans. Additionally, select additional measures for the same source and target plans.

When returning to the Load Measures from Other Plans page, another folder appears in Available Measures. My Measures folder displays the last set of selected measures.
13. Adjust forecasts in your Sales and Operations Plan based upon the latest supply measure data coming from your tactical Supply Plan(s).

Note: If you re-run the Sales and Operations Plan and the Scope Option ‘Plan supply’ = Yes then supply measure data from your Supply Plan(s) might be overwritten. For example, the S&OP engine outputs measures such as Constrained Forecast, Production Plan, Resource Requirements, and Projected Available Balance. The latest values from the engine will replace the prior values in those measures.

14. If you have a formal approvals process then review and approve your Sales and Operations Plan. The Approve plan action copies the Consensus Forecast to the Approved Consensus Forecast.

15. Use the demand forecast from your Sales and Operations Plan as a demand schedule in your Supply Plan(s). Select either the Approved Consensus Forecast or the Consensus Forecast measure in the Supply Plan Input field.

16. Re-run your Supply Plan(s) using the updated demand.

Process Steps for loading measure data from Demand and Supply Planning Cloud (ISD) or Planning Central Cloud (PC) to S&OP Cloud (S&OP)

If your S&OP process starts with the latest tactical demand and supply plans then you can load measure data from Demand and Supply Plans to Sales and Operations Plans.

1. Ensure the following measures belong to the measure catalogs used by Demand and Supply Plans and Sales and Operations Plans:
   - Shipments Forecast
   - Adjusted Shipments Forecast
   - Bookings Forecast
1. Adjusted Bookings Forecast
2. Constrained Forecast
3. Sales Orders
4. Dependent Demand
5. On Hand
6. Planned Orders
7. Production Plan
8. Purchase Orders
9. Transfer Orders
10. Work Orders

Manage measure catalogs by using the Configure Planning Analytics task.

2. Create Tactical Total Demand and Tactical Total Supply user-defined measures using the Manage Planning Measures task in the S&OP Cloud work area. Refer to the prior section for details on defining these measures. Ensure these measures belong to the measure catalog used by S&OP plans.

3. (Optional) Add other predefined measures in the measure catalogs you use in both the source Demand and Supply Plan and the target Sales and Operations Plan. Manage measure catalogs by using the Configure Planning Analytics task.

4. Run both the source Demand and Supply Plan and target Sales and Operations Plan. When running the Demand and Supply Plan, ensure the Save plan to database radio button is set to ‘Save all’ in the Run Plan dialog. Ensure both plan types run successfully.

5. In the Sales and Operations Planning work area, select the Load Measures from Other Plans task to copy measure data from your Demand and Supply Plan to your Sales and Operations Plan.

6. Select a From Plan (source plan name) and then a To Plan (target plan name). The From Plan list includes Demand Plans, Supply Plans, and Demand and Supply Plans. The To Plan list includes Sales and Operations Plans.

After selecting the source and target plans, the list of Available Measures displays the measures in common between their measure catalogs.

7. Find measures by entering measure names and clicking Find. Select measure(s) from the filtered list and click on Move to shuttle from Available Measures to Selected Measures. This list should include the following measures:

- Shipments Forecast
- Adjusted Shipments Forecast
- Bookings Forecast
- Adjusted Bookings Forecast
- Constrained Forecast
- Sales Orders
8. Click on the Submit button to launch the scheduled process.
   You can monitor plan status by selecting the View Status Details plan action.
   You can monitor the Load Measures from Other Plans job by using the Scheduled Processes task. The Log attachment summarizes the plans and measures used in the process.

9. Review user-defined reports to validate the process.

10. Repeat steps 5-9 for each Demand and Supply plan if there are multiple source plans. Additionally, select additional measures for the same source and target plans.
    When returning to the Load Measures from Other Plans page, another folder appears in Available Measures. My Measures folder displays the last set of selected measures.

11. Incorporate the Final Shipments Forecast (or Final Bookings Forecast) into the Consensus Forecast in your Sales and Operations Plan.

12. Adjust forecasts in your Sales and Operations Plan based upon the latest tactical supply data.

13. Run the sales and operations plan (do not refresh data).

14. If necessary, reload supply measures from the demand and supply plan to the sales and operations plan.

15. If you have a formal approvals process then review and approve your Sales and Operations Plan. The Approve plan action copies the Consensus Forecast to the Approved Consensus Forecast.

16. Use the demand forecast from your Sales and Operations Plan as a demand schedule in your Demand and Supply Plan. Select either the Consensus Forecast or the Approved Consensus Forecast.

17. Re-run your Demand and Supply Plan(s) using the updated demand.

**Process Steps for loading measure data from S&OP Cloud to Demand Management**

If your tactical Configure-to-Order (CTO) planning starts with the latest consensus demand plan then you can load measure data from Sales and Operations Plans to Demand Plans (or Demand and Supply Plans).
1. Ensure the following measures belong to the measure catalogs used by Sales and Operations Plans and Demand Plans (or Demand and Supply Plans):
   - Approved Consensus Forecast
   - Sales Forecast and Adjusted Sales Forecast
   - (optional) Internal Forecast, Adjusted Internal Forecast, and Final Internal Forecast
   - Custom measure(s)

   **Note:** The Load Measures from Other Plans task filters out weighted average measures. Therefore, you cannot copy adjustment measures such as **Change to Consensus Forecast Percentage**. Use the **Adjusted Consensus Forecast** measure to make adjustments by percentage.

   Manage measure catalogs by using the **Configure Planning Analytics** task.

2. (Optional) Add other predefined and/or user-defined measures in the measure catalogs you use in both the source Sales and Operations Plan and the target Demand Plan. Manage measure catalogs by using the **Configure Planning Analytics** task.

   Additionally, you must select the **Include measure in the Common Measures group** checkbox when creating a user-defined measure in **Manage Planning Measures**.

3. Run both the source Sales and Operations Plan and target Demand Plan. Ensure both run successfully.

4. In the Demand Management (or Demand and Supply Planning) work area, select the **Load Measures from Other Plans** task to copy measure data from your Sales and Operations Plan to your Demand Plan.
5. Select a **From Plan** (source plan name) and then a **To Plan** (target plan name). The **From Plan** list includes Sales and Operations Plans. The **To Plan** list includes Demand Plans and Demand and Supply Plans. After selecting the source and target plans, the list of **Available Measures** displays the measures in common between their measure catalogs.
6. Find measures by entering measure names and clicking **Find**. Select measure(s) from the filtered list and click on **Move** to shuttle from **Available Measures** to **Selected Measures**. This list should include the following measures:
   - Approved Consensus Forecast
   - Sales Forecast
   - Adjusted Sales Forecast
   - *(optional)* Internal Forecast
   - *(optional)* Adjusted Internal Forecast
   - Custom measure(s)

7. Click on the **Submit** button to launch the scheduled process.
You can monitor plan status by selecting the **View Status Details** plan action.

You can monitor the **Load Measures from Other Plans** job by using the **Scheduled Processes** task. The **Log** attachment summarizes the plans and measures used in the process.
8. Review user-defined reports to validate the process.

![Demand Plan data - Target](image-url)
9. Repeat steps 4-8 for each Demand plan if there are multiple source plans. Additionally, select additional measures for the same source and target plans.

   When returning to the **Load Measures from Other Plans** page, another folder appears in **Available Measures**. **My Measures** folder displays the last set of selected measures.

10. Incorporate the demand forecasts from your S&OP plan(s) into the Final Shipments Forecast in your Demand Plan(s). Review and adjust CTO planning percentages in your Demand Plan.

11. If you have a formal approvals process then review and approve your Demand Plan.

12. Use the Final Shipments Forecast from your Demand Plan as a demand schedule in your Supply Plan(s).

13. Re-run your Supply Plan(s) using the updated demand.