Oracle Collaborative Planning

Supplier Training Document

Navigation, Search & Filter Data
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1. Log into Oracle CP

When a user clicks on the link to the Oracle Collaborative Planning application (hereby referred to as Oracle CP in this document), the login screen shown below will appear:

Enter your username and password and click on ‘Login’. The Oracle E-Business Suite Home Page will appear (see below).

On the left hand side, you see the responsibility called ‘Supply Chain Collaboration Planner’. Once you click on the responsibility, the right hand side will change to reflect the available menu options for that particular responsibility.

Now click on the right hand side link called ‘Home’. This will display the home page of Oracle CP.
Here one can see tabs having different menu headers. (Home, Exception, Planning & Admin)

Alternatively, below the tabs, you can see the entire menu options available for this responsibility along with the respective tab headers.

2. Exception Messages

Exception messages in Oracle CP identify issues that need your attention. Examples of some exception messages are as below:

‘Response required for customer purchase order’
‘Customer purchase order has been cancelled’
‘Customer purchase order has been rescheduled’

and so on.

The above exception messages are generated when Cummins has uploaded the new purchase orders or cancelled a purchase order or changed the receipt date, respectively.

There are other exception messages that identify quantity and / or date mismatches between the PO posted by Cummins and the PO Acknowledgement posted by a supplier.

Refer to the document titled ‘Exception Management v2.pdf’ for more details on exception messages.
To view exception messages, click on the ‘Exception’ tab or the ‘Exception Summary’ link on the right hand side of the home page. The Exception Summary page is displayed with all the exception messages that currently exist in Oracle CP.

**1. Basic Search**

You can query and filter the exception summary messages by providing various search parameters.

**Search by Item**

In the search section, click on the icon next to the item field. This icon represents that there are list of values available for the field. This displays a page where you can search for particular items.

Specify the item name and click on button.

**Note**: You can perform wild card searches by specifying a partial item name and specifying a ‘%’. For example, if one wants to search for all items that begin with 165, one could specify 165% and conduct a search.

You see the list of Items.

Click on the quick select icon to select the item.
The item number will appear in the Exception Summary form. Click on the 'View' button. You can see the Exception messages for the item selected (165174).

Note: The ‘Customer Item’ and ‘Supplier Item’ fields are not currently being used.
2. Advanced Search

The standard search form offers certain search parameters as demonstrated above. We can add a few more search parameters using ‘Advanced Search’

Click on the Advanced Search button. In this form we can add different fields as parameters for the search.

Searching by Exception Type

For example, to search by ’Exception Type’, click on Exception type icon. This displays the form where you can search for exception types.

Enter the search criteria (% can be used as a wild card character) and click on .. You see the list of exception types.
Select the exception type that you want to search on, by clicking on the icon. Then click on Search.

The exception summary screen displays the count of messages for the selected exception.
3. **Adding search parameters in Advanced Search**

One can add other search parameters in the Advanced Search area as explained below. In the ‘Add Another’ dropdown, select the parameter that you want to search by and click on **Add**.

In the below example, ‘Customer Site’ has been added as a search parameter.

![Advanced Search Interface](image)

One can search for customer sites by clicking on the icon next to the ‘Customer Site’ field. Select the customer site you want to search on and click on **Search**.

![Advanced Search Interface](image)

The exception summary page will now display the list of exception messages relevant for the selected customer site.

Similarly, you can add other fields using **Add** in the Advanced Search and search on multiple parameters as shown below. Clicking on **Search** will retrieve the exception messages that match the search criteria.
NOTE: After a filtered search, if you want to view the exception messages across all items always click on the Go button first. This will ensure the correct count of messages is retrieved. Else, the previous search criterion is retained in the browser cache and the results might be erroneous.

4. Viewing exception details from the exception summary.

The exception summary screen displays the various exception messages along with the count of PO lines that fall under each exception category.
Clicking on a specific exception message, will display the exception details where the PO lines that are affected by this specific exception are displayed. The number of records/lines displayed in the exception details screen will be per the count displayed in the exception summary page.

One can also view the exception details page by clicking on 'Exception Details' under the 'Exception' tab.

Another navigation option to get the exception details page is to click on the link called 'Exception Details' on the right hand side in the home page.
5. Search options on the exception details page

In the Exception Details form also we can search for the details giving the parameters as done above.

If you click on the Purchase order number in the details, you can see the data related to that purchase order number in the Vertical View.
2. Planning

The ‘Planning’ tab provides two different views to view data in Oracle CP. The two views are Horizontal View and the Vertical View. When you click on the ‘Planning’ tab, the default view displayed is the Horizontal View.
2.1 Horizontal View

The Horizontal View displays data in a time-bucketed fashion. The time buckets displayed are daily, weekly and monthly buckets depending on parameters established in the default preference set of the application.

1. Basic Search

By default, the Horizontal View displays no data. One can search for data using various search parameters. We can select specific values for item from the List of Values (LOV) by clicking on the icon and choosing the desired values from the list.

To search by Order Type, click on the icon next to Order Type field. You see the different types of Orders. Select one order type by clicking on the icon. Then click on button on Horizontal view form.
You see the data for the order type selected. You see the data in the bucketing pattern as per the default preference set.

**Note:** For Phase 1 of the Oracle CP project at Cummins Filtration, we will be using the order types of ‘Purchase order’ and ‘Order forecast’. Suppliers will be posting PO Acknowledgements to Purchase orders. The other order types are not being used.
Clicking on the quantity in a particular time bucket, will display the orders that fall in this time bucket. The order is displayed in the Vertical View as shown below.

Clicking on the Order Type of any row, will display all the records of that Order Type for that combination of Customer/Customer Site and Supplier/Supplier Site in the Vertical View.
In the above example, if you click on ‘Purchase Order’ as highlighted, this will display all the order records that pertain to the item.

2. Advanced Search

One can search for data using additional search parameters by clicking on the ‘Advanced Search’ button in the Horizontal View.

In the ‘Add Another’ dropdown, select the parameter that you want to search by and click on Add and then click on Search.
One can also enter the Start date to view the data from that date in the Horizontal View.

**Note:** The additional search parameters added in the Advanced Search page are valid for the current login session only. Once you logout, these selections will not be maintained and will need to be added again during the next login session.

### 2.2 Vertical View

The Vertical View displays data in a row-column fashion, for each item. By default, the Vertical View displays all data present in Oracle CP.

The Vertical View displays all the data relevant to a PO, PO Acknowledgement, Order Forecast, etc. The columns represent the attributes of the order.
1. Basic Search

One can search/filter for data in Vertical View using the basic search fields available. The search fields available here are Item, Order Type and Order Number. (The ‘Customer Item’ and ‘Supplier Item’ fields are not used currently)

To search for a specific item, click on the icon next to the item field. This icon represents that there are list of values available for the field. This displays a page where you can search for particular items. Specify the item name and click on button.
Note: You can perform wild card searches by specifying a partial item name and specifying a '%'. For example, if one wants to search for all items that begin with 165, one could specify 165% and conduct a search.

You see the list of Items. Click on the quick select icon to select the item. Then the item number will appear in the Item field in the Vertical View.
Similarly, you can search for a specific Order Type i.e. Purchase order, Order forecast, PO Acknowledgement, etc.

To view if there has been a PO acknowledgement against a particular PO line, you can click on the Order Number, and then you see if a PO acknowledgement has been submitted for this PO line.

In the below example, you see that there is a PO Acknowledgement 'pegged' to the PO line.
One can also search for a specific PO number by entering the PO number in the ‘Order Number’ field as shown below.

2. Advanced Search

Click on the “Advanced Search” button. In the other form you see list of different search parameters than can be added. Select the parameter you wish to add and click on Add.

Then select the desired values from the LOV for each search parameter and click on the ‘Search’ button.
You can perform the search by selecting one of the below options:

1. Search results where each must contain all values entered.  
2. Search results where each may contain any value entered.

Select the desired option that you want to search by.

The search data can also be sorted by the sorting preference entered. You can select the Primary, Secondary & Tertiary sorting parameters from the LOV and the Ascending / Descending order in which you want to view the data in the Vertical View.
Click on 'Search' to display the results in the Vertical View

Oracle Collaborative Planning

Horizontal View | Vertical View | VM | Forecast Companion | Create Order | Planner Workbench | Custom View

Search results where each must contain all values entered.
Search results where each may contain any value entered.

- Item
- Customer Item
- Supplier Item
- Owner Item
- Customer
- Customer Site

Add Another Customer Site
Add

Primary Sort By: Receipt Date [Ascending]
Secondary Sort By: Item [Ascending]
Tertiary Sort By:

Click on 'Search' to display the results in the Vertical View

Oracle Collaborative Planning

Horizontal View | Vertical View | VM | Forecast Companion | Create Order | Planner Workbench | Custom View

Vertical View

Search
- Item
- Customer Item
- Supplier Item

Advanced Search

Views
- View
- Vs
- Preferences

Select Objects
- Exception Details
- Order Details
- Save
- Export All

Select All | Selections

- Item
- Description
- Part No
- Rev No
- Customer
- Supplier
- Supplier Site
- Order Type
- Order Number
- PO Number
- Release Number
- Line Number
- Quantity
- Expected Receipt
- BOM Date

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