



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:

ORACLE E-Business Suite

Login

Username
(example: michael.james.smith)

Password
(example: 4u99v23)

TIP [Forgot your password?](#)

TIP [Register here](#)

[Español Latinoamericano](#) * [Français](#) * [English](#)

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

ORACLE E-Business Suite

Navigator

Supply Chain Collaboration Planner Please select a responsibility.

Favorites
You have not selected any Favorites. Click the "Add to Favorites" button to add items to your Favorites list.

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.

ORACLE E-Business Suite

Navigator

Supply Chain Collaboration Planner Collaborative Planning

Home

Favorites
You have not selected any Favorites. Click the "Add to Favorites" button to add items to your Favorites list.

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.

The screenshot shows the Oracle Collaborative Planning interface. At the top, there are navigation tabs: Home, Exceptions, Planning, and Admin. Below the tabs, there are two main sections: 'Recent Notifications' and 'Recent Exceptions'. The 'Recent Exceptions' section contains a table with columns: Item, Organization, Exception Type, Exception Group, and Count.

Item	Organization	Exception Type	Exception Group	Count
SR002	Acme-Denver	Customer response required for sales order	Response Required	1
165173	Acme-Nashville	Response required for customer purchase order	Response Required	1
165174	Acme-Nashville	Response required for customer purchase order	Response Required	1
165174	Acme-Nashville	Replenishment to customer is past due	Late Orders	1
SR022	Acme-Nashville	Early replenishment to customer	Early Orders	1

On the right side, there is a sidebar menu with the following options: Exceptions (Exception Summary, Exception Details), Planning (Custom View, VMI, Horizontal View, Vertical View, Forecast Comparison, Create Order, Planner Workbench), and Admin (Planner Tasks, Notify Supplier, New Forecast, View Requests, Load SupplyDemand, Define User Preferences, Define Custom Exceptions, Define Exception Settings, Notify Customer, New Supply Commit).

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.

ORACLE Collaborative Planning

Home Logout Preferences Help

Home **Exceptions** Planning Admin

Exception Summary | Exception Details

Exception Summary

Search

Item Customer

Customer item Supplier

Supplier item

Select Exception Type:

Select All | Select None

Select Exception Type	Exception Group	Count	Rank
<input type="checkbox"/> Late replenishment to customer	Late Orders	2	1
<input type="checkbox"/> Replenishment to customer is past due	Late Orders	1	2
<input type="checkbox"/> Customer purchase order has been rescheduled	Changed Orders	1	4
<input type="checkbox"/> Short supply for customer purchase order	Material Shortage	1	5
<input type="checkbox"/> Response required for customer purchase order	Response Required	2	6
<input type="checkbox"/> Early replenishment to customer	Early Orders	1	7

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.

Search and Select List of Values - Microsoft Internet Explorer

Search and Select: Item Cancel Select

Search
To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By Item % Go

Results Previous 1-20 Next 20

Select	Quick Select	Item	Item Description
<input type="radio"/>		165002	FG ITEM4
<input type="radio"/>		165084	165084 - CATLST CERAMIC 300 8.50 OD X 5.50 L
<input type="radio"/>		165097	ELEMENT - CATLST CERAMIC 400 10.50 OD X 6.00 L
<input type="radio"/>		165098	045 - CATLST SOOT FILTER 10.50 OD X 12.00 L
<input type="radio"/>		165137	165137 - CATLST CERAMIC 400 9.50 OD X 6.00 L
<input type="radio"/>		165159	165159 - CATLST CERAMIC 300 7.50 OD X 7.00 L 2
<input type="radio"/>		165173	0165173 - CATLST CERAMIC 300 7.57 OD X 10.83 OD X
<input type="radio"/>		165174	165174 - CATLST CERAMIC 300 7.50 OD X 5.20 L
<input type="radio"/>		165183	165183 - CATLST CERAMIC 400 9.50 OD X 6.00 L
<input type="radio"/>		165212	165212 - CATLST CERAMIC 300 9.50 OD X 5.00 L
<input type="radio"/>		165269	MPT PC 1 planner item

The item number will appear in the Exception Summary form. Click on Go button. You can see the Exception messages for the item selected (165174)

ORACLE Collaborative Planning Home Logout Preferences Help

Home Exceptions Planning Admin

Exception Summary | Exception Details

Exception Summary

Search Advanced Search

Customer
 Supplier

Go

Select Exception Type: Show Details

[Select All](#) | [Select None](#)

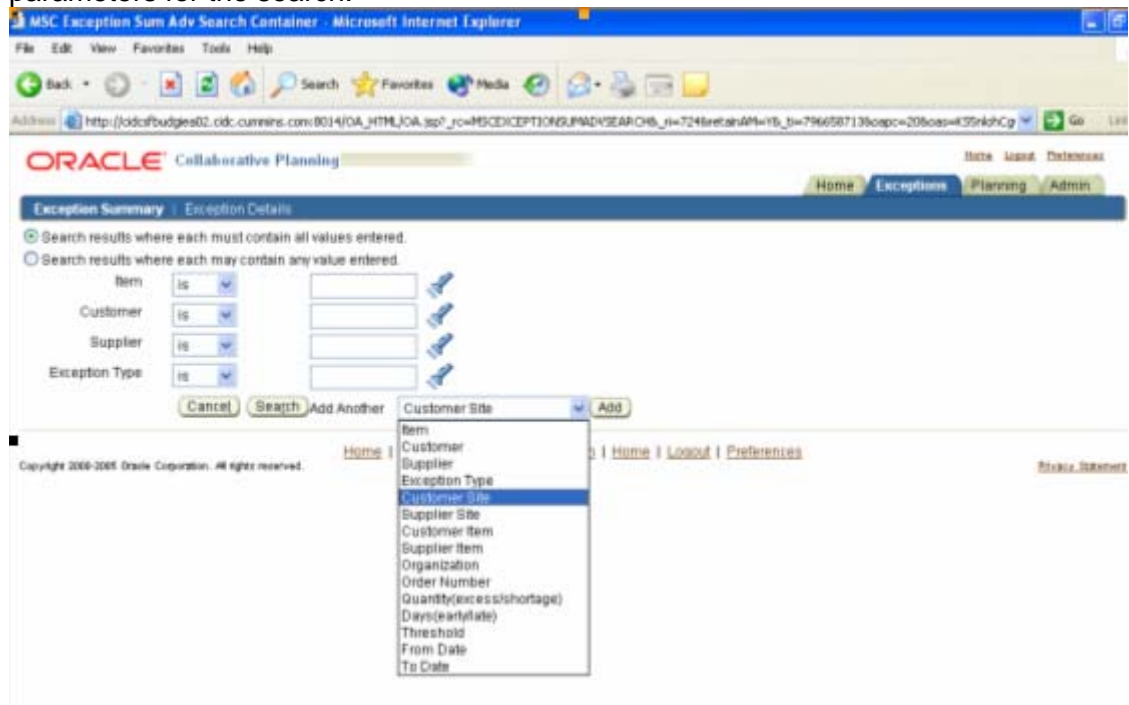
Select Exception Type	Exception Group	Count	Rank
<input type="checkbox"/> Replenishment to customer is past due	Late Orders	1	2
<input type="checkbox"/> Response required for customer purchase order	Response Required	1	6

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 **Go** .. You see the list of exception types.

address http://cidcsfbudgiea02.cidc.com Search and Select List of Values - Microsoft Internet Explorer

ORACLE Collaborative Planning

Exception Summary | Exception Details

Search results where each must contain all of the following
 Search results where each may contain any of the following

Item
 Customer
 Supplier
 Exception Type

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Search and Select: Exception Type

Search
To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the icon.

Search By

Results

Select	Quick Select	Exception Type
<input type="radio"/>		Late replenishment to customer
<input type="radio"/>		Late replenishment from supplier
<input type="radio"/>		Replenishment to customer is past due
<input type="radio"/>		Replenishment from supplier is past due
<input type="radio"/>		Supply commit is less than customer order forecast
<input type="radio"/>		Supplier supply commit is less than order forecast
<input type="radio"/>		Short supply for customer purchase order
<input type="radio"/>		Short supply from supplier for purchase order
<input type="radio"/>		VMI item shortage at customer site, replenishment required
<input type="radio"/>		VMI item shortage at your site
<input type="radio"/>		Response required for customer purchase order

Select the exception type that you want to search on, by clicking on icon. Then click on

The exception summary screen displays the count of messages for the selected exception.

ORACLE Collaborative Planning

[Home](#) [Logout](#) [Preferences](#) [Help](#)

[Home](#) [Exceptions](#) [Planning](#) [Admin](#)

Exception Summary | Exception Details

Exception Summary

Search

Item Customer
 Customer item Supplier
 Supplier item

Select Exception Type:

Select All | Select None

Select Exception Type	Exception Group	Count	Rank
<input type="checkbox"/> Response required for customer purchase order	Response Required	2	6

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.

The screenshot shows the Oracle Collaborative Planning interface. At the top, there are navigation links: Home, Logout, Preferences. Below that, a breadcrumb trail shows Home, Exceptions, Planning, Admin. The main content area has a header with 'Exception Summary' and 'Exception Details'. There are two radio buttons for search criteria: 'Search results where each must contain all values entered.' (unselected) and 'Search results where each may contain any value entered.' (selected). Below this, there is a table of search parameters:

Field	Operator	Value	Action
Item	is		[Search Icon]
Customer	is		[Search Icon]
Supplier	is		[Search Icon]
Exception Type	is	Response requi	[Search Icon]
Customer Site	is		[Search Icon]

At the bottom, there are buttons: Cancel, Search, Add Another, Customer Site (dropdown), and Add. The 'Customer Site' field and its search icon are circled in red.

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**

The screenshot shows the Oracle Collaborative Planning interface. At the top, there are navigation links: Home, Logout, Preferences. Below that, a breadcrumb trail shows Home, Exceptions, Planning, Admin. The main content area has a header with 'Exception Summary' and 'Exception Details'. There are two radio buttons for search criteria: 'Search results where each must contain all values entered.' (unselected) and 'Search results where each may contain any value entered.' (selected). Below this, there is a table of search parameters:

Field	Operator	Value	Action
Item	is		[Search Icon]
Customer	is		[Search Icon]
Supplier	is		[Search Icon]
Exception Type	is		[Search Icon]
Customer Site	is	MPT	[Search Icon]

At the bottom, there are buttons: Cancel, Search, Add Another, Customer Site (dropdown), and Add. The 'Customer Site' field and its search icon are highlighted with a red box.

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.

Exception Summary | Exception Details

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

Item is
 Customer is
 Supplier is
 Exception Type is
 Customer Site is
 From Date is

NOTE: After a filtered search, if you want to view the exception messages across all items always click on **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.

ORACLE Collaborative Planning

Home Logout Preferences Help

Home Exceptions Planning Admin

Exception Summary | Exception Details

Exception Summary

Search

Item Customer
 Customer item Supplier
 Supplier item

Select Exception Type:

Select All | Select None

Select Exception Type	Exception Group	Count	Rank
<input type="checkbox"/> Late replenishment to customer	Late Orders	2	1
<input type="checkbox"/> Replenishment to customer is past due	Late Orders	1	2
<input type="checkbox"/> Customer purchase order has been rescheduled	Changed Orders	1	4
<input type="checkbox"/> Short capacity for customer purchase order	Material Shortage	1	5
<input type="checkbox"/> Response required for customer purchase order	Response Required	2	6
<input type="checkbox"/> Early replenishment to customer	Early Orders	1	7

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

ORACLE Collaborative Planning

Home Logout Preferences Help

Home Exceptions Planning Admin

Exception Summary | **Exception Details**

Exception Details

Search

Item Customer

Customer item Supplier

Supplier item

Go Advanced Search

Response required for customer purchase order

Shipping Organization	Item	Item Description	Supplier Item	Customer	Customer Site	Customer Purchase Order	Customer Purchase Order Line	Customer Purchase Order Release	Customer Purchase Order Quantity	Customer Purchase Order Need By Date	Customer Purchase Order Creation Date	Exception Basis	Threshold (Days)
Acme-Nashville	165173	0165173 - CATLST CERAMIC 300 7.57 OD X 10.83 OD X		Fleetguard	MPT	PO-61920061	1		75	15-JUN-2006	10-MAY-2006	Arrival	0
Acme-Nashville	165174	165174 - CATLST CERAMIC 300 7.50 OD X 5.20 L		Fleetguard	BLM	PO-63020061	1		40	30-MAY-2006	10-MAY-2006	Arrival	0

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

ORACLE Collaborative Planning

Home Logout Preferences Help

Home **Exceptions** Planning Admin

Exception Summary | **Exception Details**

Exception Details

Search

Item Customer

Customer item Supplier

Supplier item

Go Advanced Search

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

Recent Notifications

Subject	Sent
The supply/demand file SupplyDemand_POACK3.dat uploaded on was s...	07-Jun-2006
The supply/demand file SupplyDemand_POACK3.dat uploaded on was n...	07-Jun-2006
The supply/demand file SupplyDemand_commit_3.dat uploaded on was...	30-May-2006

Recent Exceptions

Item	Organization	Exception Type	Exception Group	Count
SR002	Acme-Denver	Customer response required for sales order	Response Required	1
165173	Acme-Nashville	Response required for customer purchase order	Response Required	1
165174	Acme-Nashville	Response required for customer purchase order	Response Required	1
165174	Acme-Nashville	Replenishment to customer is past due	Late Orders	1
SR022	Acme-Nashville	Early replenishment to customer	Early Orders	1

Exceptions

- Exception Summary
- Exception Details**
- Planning
- Custom View
- VMI
- Horizontal View
- Vertical View
- Forecast Comparison
- Create Order
- Planner Workbench
- Admin
 - Planner Tasks
 - Notify Supplier: New Forecast
 - View Requests
 - Load SupplyDemand
 - Define User Preferences
 - Define Custom Exceptions
 - Define Exception Settings
 - Notify Customer: New Supply Commit

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.

Exception Summary | **Exception Details**

Exception Details

Search

Item Customer

Customer item Supplier

Supplier item

Late replenishment to customer

[View All](#)

Shipping Organization	Item	Item Description	Supplier Item	Customer Site	Customer Days	PO Ack	PO Ack Line	PO Ack Quantity	PO Ack Receipt Date	PO Ack Ship Date	Customer Purchase Order	Customer Purchase Order Line	Customer Purchase Order Release	Customer Purchase Order Quantity	Customer Purchase Order Need By Date	Customer Purchase Order Ship Date
Acme-Denver	SR002	MPT SRAO PlannerITEM	Fleetguard	MPT	5	SR-11052006	1	201	01-JUL-2006	01-JUL-2006	SR-11052006			201	26-JUN-2006	26-JUL-2006

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**

Vertical View

Search

Item Order Type Advanced Search
 Customer item Order Number SR-11052006
 Supplier item Go

Views

View Go Personalize

Select Object: Exception Details Order Details Save | Export All

Select All | Select None

Select	Item	Item Description	Part Drawing / Rev Drawing No	Customer Site	Supplier Site	Order Type	Order Number	PO Rev Number	Release Number	Line Number	Quantity	UOM	Expect Receipt Date
<input type="checkbox"/>	SR002	MPT SRAO PlannerITEM		Fleetguard MPT	Acme-Chemicals Denver	Purchase order	SR-11052006				201.00	EA	26-Jun
<input type="checkbox"/>	SR002	MPT SRAO PlannerITEM		Fleetguard MPT	Acme-Chemicals Denver	PO Acknowledgement	SR-11052006				201	EA	06-Jun
<input type="checkbox"/>	SR002	MPT SRAO PlannerITEM		Fleetguard MPT	Acme-Chemicals Denver	PO Acknowledgement	SR-11052006			1	201	EA	01-Jul-

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.

Horizontal View

Search


Item Customer Advanced Search
 Customer Item Supplier
 Supplier Item Order Type Go

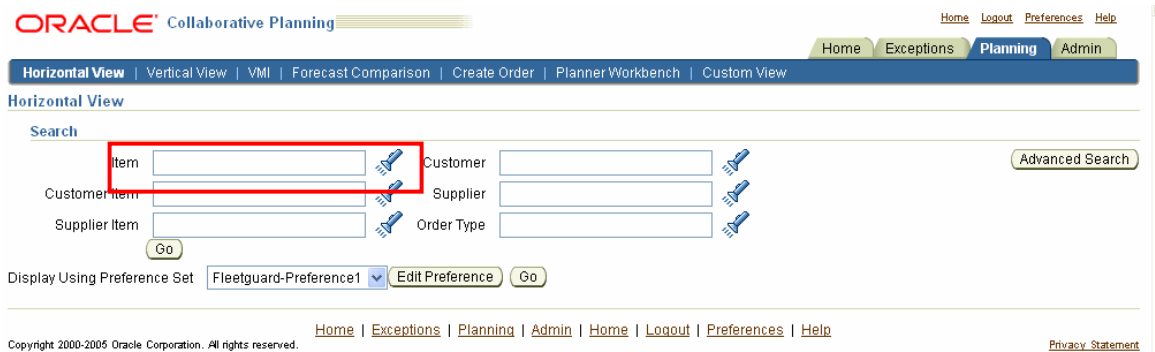
Display Using Preference Set Fleetguard-Preference1 Edit Preference Go

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.

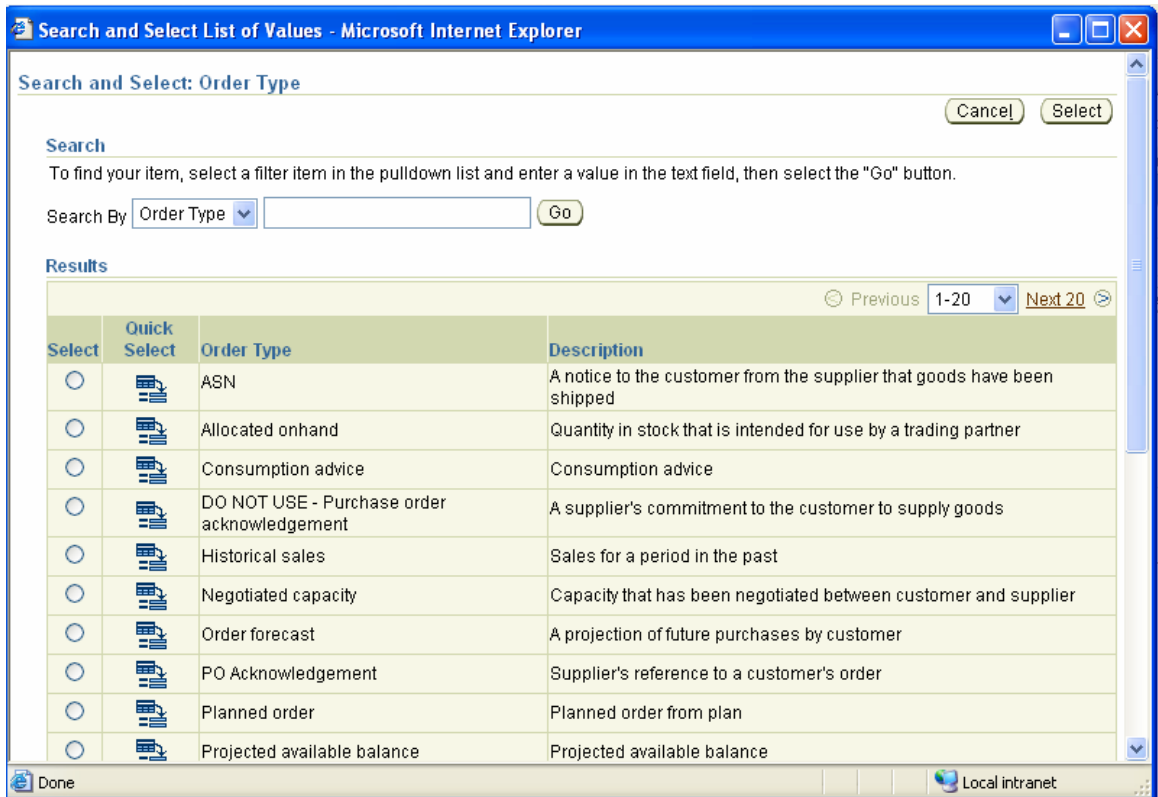
1. Basic Search

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



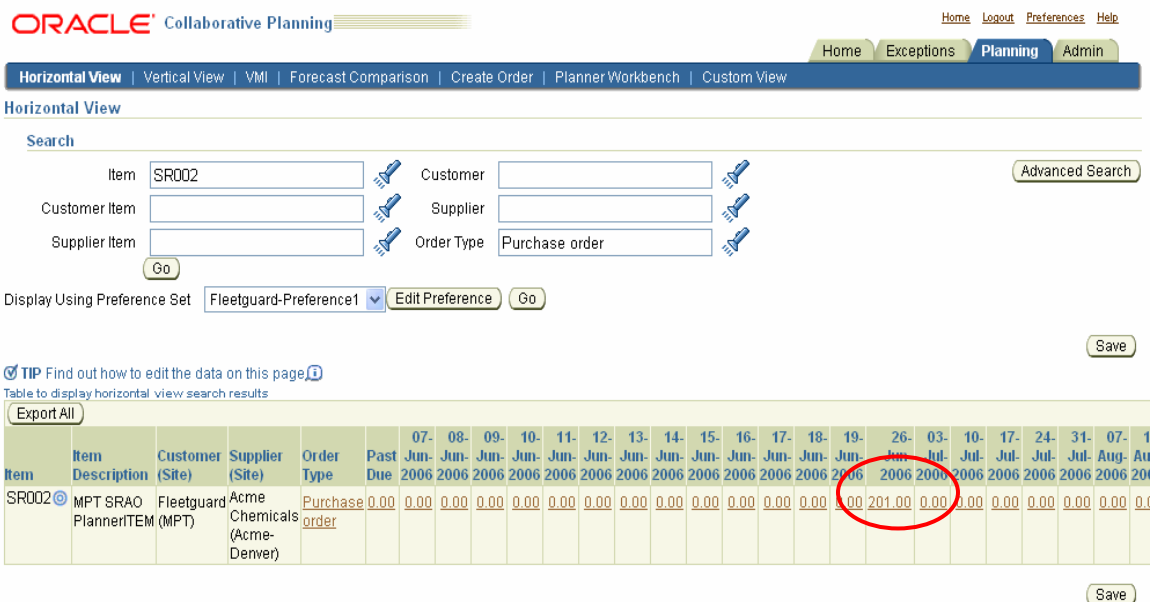
The screenshot shows the Oracle Collaborative Planning interface. At the top, there is a navigation bar with links for Home, Logout, Preferences, and Help. Below this is a secondary navigation bar with links for Horizontal View, Vertical View, VMI, Forecast Comparison, Create Order, Planner Workbench, and Custom View. The main content area is titled "Horizontal View" and contains a "Search" section. This section includes four input fields: "Item", "Customer", "Supplier", and "Order Type". Each field has a small icon to its right, representing a List of Values (LOV) selection tool. The "Item" field is highlighted with a red rectangle. Below the input fields is a "Go" button. To the right of the "Go" button is an "Advanced Search" button. At the bottom of the search section, there is a "Display Using Preference Set" dropdown menu set to "Fleetguard-Preference1", an "Edit Preference" button, and another "Go" button. The footer of the page contains copyright information and a Privacy Statement link.

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 Phase1 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

The screenshot shows the Oracle Collaborative Planning interface in Vertical View. The search filters are: Item: SR002, Order Type: (empty), Customer item: (empty), Order Number: (empty), Supplier item: (empty). The 'Go' button is highlighted. Below the search filters, the 'Views' section shows a dropdown menu set to 'Vertical View' and a 'Personalize' button. The 'Select Object' section includes buttons for 'Exception Details', 'Order Details', 'Save', and 'Export All'. The main data table has the following columns: Select Item, Item Description, Part Rev Drawing / Rev No, Customer, Customer Site, Supplier, Supplier Site, Order Type, Order Number, PO Rev Number, Release Line Number, Quantity UOM, Expected Receipt Date, Unit Price, and Current. The table contains one row with the following data: Select Item: SR002, Item Description: MPT SRAO PlannerITEM, Part Rev Drawing / Rev No: (empty), Customer: Fleetguard, Customer Site: MPT, Supplier: Acme Chemicals, Supplier Site: Acme-Denver, Order Type: Purchase order, Order Number: SR-11052006, PO Rev Number: (empty), Release Line Number: (empty), Quantity UOM: 201.00 EA, Expected Receipt Date: 26-Jun-2006, Unit Price: (empty), Current: (empty).

In the Horizontal View, if you click on **Go** button without specifying any values as search parameters, this will display all order types for all items, placed by all customer sites (plants).

The screenshot shows the Oracle Collaborative Planning interface in Horizontal View. The search filters are: Item: (empty), Customer: (empty), Customer Item: (empty), Supplier: (empty), Supplier Item: (empty), Order Type: (empty). The 'Go' button is highlighted. Below the search filters, the 'Display Using Preference Set' section shows a dropdown menu set to 'Fleetguard-Preference1' and an 'Edit Preference' button. The 'Save' button is also visible. Below the search filters, there is a 'TIP' link and an 'Export All' button. The main data table has the following columns: Item, Item Description, Customer (Site), Supplier (Site), Order Type, Past Due, 07-Jun-2006, 08-Jun-2006, 09-Jun-2006, 10-Jun-2006, 11-Jun-2006, 12-Jun-2006, 13-Jun-2006, 14-Jun-2006, 15-Jun-2006, 16-Jun-2006, 17-Jun-2006, 18-Jun-2006, 19-Jun-2006, 26-Jun-2006, 03-Jul-2006, 10-Jul-2006, 17-Jul-2006, 24-Jul-2006. The table contains three rows with the following data: Row 1: Item: 165173, Item Description: 0165173 - CATLST CERAMIC 300 7.57 OD X 10.83 OD X, Customer (Site): Fleetguard (MPT), Supplier (Site): Acme Chemicals (Acme-Nashville), Order Type: Purchase order, Past Due: 100.00, 07-Jun-2006: 0.00, 08-Jun-2006: 0.00, 09-Jun-2006: 50.00, 10-Jun-2006: 0.00, 11-Jun-2006: 0.00, 12-Jun-2006: 0.00, 13-Jun-2006: 0.00, 14-Jun-2006: 75.00, 15-Jun-2006: 0.00, 16-Jun-2006: 0.00, 17-Jun-2006: 0.00, 18-Jun-2006: 0.00, 19-Jun-2006: 0.00, 26-Jun-2006: 0.00, 03-Jul-2006: 0.00, 10-Jul-2006: 0.00, 17-Jul-2006: 0.00, 24-Jul-2006: 0.00. Row 2: Item: (empty), Item Description: (empty), Customer (Site): Fleetguard (MPT), Supplier (Site): Acme Chemicals (Acme-Nashville), Order Type: PO Acknowledgement, Past Due: 150.00, 07-Jun-2006: 0.00, 08-Jun-2006: 0.00, 09-Jun-2006: 0.00, 10-Jun-2006: 0.00, 11-Jun-2006: 0.00, 12-Jun-2006: 0.00, 13-Jun-2006: 0.00, 14-Jun-2006: 0.00, 15-Jun-2006: 50.00, 16-Jun-2006: 0.00, 17-Jun-2006: 0.00, 18-Jun-2006: 0.00, 19-Jun-2006: 0.00, 26-Jun-2006: 0.00, 03-Jul-2006: 0.00, 10-Jul-2006: 0.00, 17-Jul-2006: 0.00, 24-Jul-2006: 0.00. Row 3: Item: 165174, Item Description: 165174 - CATLST, Customer (Site): Fleetguard (ARC), Supplier (Site): Acme Chemicals, Order Type: Purchase order, Past Due: 100.00, 07-Jun-2006: 0.00, 08-Jun-2006: 0.00, 09-Jun-2006: 0.00, 10-Jun-2006: 0.00, 11-Jun-2006: 0.00, 12-Jun-2006: 0.00, 13-Jun-2006: 0.00, 14-Jun-2006: 0.00, 15-Jun-2006: 0.00, 16-Jun-2006: 0.00, 17-Jun-2006: 0.00, 18-Jun-2006: 0.00, 19-Jun-2006: 0.00, 26-Jun-2006: 0.00, 03-Jul-2006: 0.00, 10-Jul-2006: 0.00, 17-Jul-2006: 0.00, 24-Jul-2006: 0.00.

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.

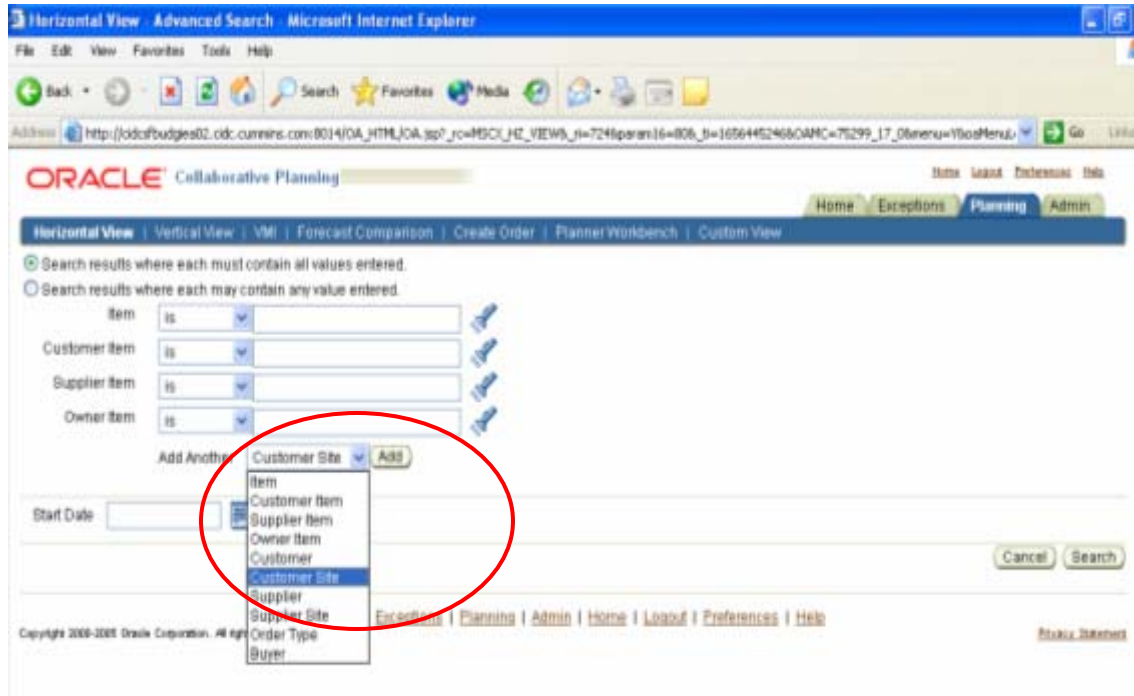
The screenshot shows the Oracle Collaborative Planning interface. At the top, there are navigation tabs: Home, Exceptions, Planning (highlighted), and Admin. Below this is a sub-menu: Horizontal View, Vertical View (selected), VMI, Forecast Comparison, Create Order, Planner Workbench, and Custom View. The main section is titled 'Vertical View' and contains a search area with fields for Item (165173), Customer item, and Supplier item, along with Order Type and Order Number fields. An 'Advanced Search' button is visible. Below the search area are 'Views' and 'Select Object' options. The main data area is a table with columns: Select, Item, Item Description, Part Rev, Drawing Rev, Customer, Customer Site, Supplier, Supplier Site, Order Type, Order Number, PO Rev Number, Release Number, Line Number, Quantity, UOM, Expected Receipt Date, Unit Price, and Currency. Two rows of data are shown, both for item 165173, with different order numbers (61920061 and 6220061).

Select	Item	Item Description	Part Rev	Drawing Rev	Customer	Customer Site	Supplier	Supplier Site	Order Type	Order Number	PO Rev Number	Release Number	Line Number	Quantity	UOM	Expected Receipt Date	Unit Price	Currency
<input type="checkbox"/>	165173	0165173 - CATLST CERAMIC 300 7.57 OD X 10.83 OD X	5	5A	Fleetguard	MPT	Acme Chemicals	Acme-Nashville	Purchase order	PO-61920061	1		1	75.00	PC	15-Jun-2006	1.1111	US
<input type="checkbox"/>	165173	0165173 - CATLST CERAMIC 300 7.57	5	5A	Fleetguard	MPT	Acme Chemicals	Acme-Nashville	Purchase order	PO-6220061	1		1	200.00	PC	02-Jun-2006	1.1111	US

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.

Vertical View

Search

Item  Order Type  Advanced Search

Customer item  Order Number 



Supplier item 

Views

View



Select Object: |

Select All | Select None

Select	Item	Part Rev	Drawing / Drawing Rev No	Customer	Customer Site	Supplier	Supplier Site	Order Type	Order Number	PO Rev Number	Release Number	Line Number	Quantity	UOM	Expecte Receipt Date
<input type="checkbox"/>	165174 			Fleetguard	MPT	Acme Chemicals	Acme-Nashville	Order forecast					100.00	PC	15-May-
<input type="checkbox"/>	165174 			Fleetguard	ARC	Acme Chemicals	Acme-Nashville	Order forecast					200.00	PC	15-May-

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.

Search and Select List of Values - Microsoft Internet Explorer

Search and Select: Item Cancel Select

Search
To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By

Results Previous 1-20 Next 20

Select	Quick Select	Item	Item Description
<input type="radio"/>		165002	FG ITEM4
<input type="radio"/>		165084	165084 - CATLST CERAMIC 300 8.50 OD X 5.50 L
<input type="radio"/>		165097	ELEMENT - CATLST CERAMIC 400 10.50 OD X 6.00 L
<input type="radio"/>		165098	045 - CATLST SOOT FILTER 10.50 OD X 12.00 L
<input type="radio"/>		165137	165137 - CATLST CERAMIC 400 9.50 OD X 6.00 L
<input type="radio"/>		165159	165159 - CATLST CERAMIC 300 7.50 OD X 7.00 L 2
<input type="radio"/>		165173	0165173 - CATLST CERAMIC 300 7.57 OD X 10.83 OD X
<input type="radio"/>		165174	165174 - CATLST CERAMIC 300 7.50 OD X 5.20 L
<input type="radio"/>		165183	165183 - CATLST CERAMIC 400 9.50 OD X 6.00 L
<input type="radio"/>		165212	165212 - CATLST CERAMIC 300 9.50 OD X 5.00 L
<input type="radio"/>		165269	MPT PC 1 planner item

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

ORACLE Collaborative Planning Home Logout Preferences Help

Home Exceptions Planning Admin

Horizontal View **Vertical View** VMI Forecast Comparison Create Order Planner Workbench Custom View

Vertical View

Search

Item Order Type Advanced Search

Customer item Order Number

Supplier item

Views

View

Select Object:

Select All | Select None

Select	Item	Item Description	Part Rev	Drawing Rev	Customer	Customer Site	Supplier	Supplier Site	Order Type	Order Number	PO Rev Number	Release Number	Line Number	Quantity	UOM	Expe Recv Date
<input type="checkbox"/>	165174	165174 - CATLST CERAMIC 300 7.50 OD X 5.20 L			Fleetguard	ARC	Acme Chemicals	Acme-Nashville	Order forecast					200.00	PC	15-M
<input type="checkbox"/>	165174	165174 - CATLST CERAMIC 300 7.50 OD X 5.20 L			Fleetguard	MPT	Acme Chemicals	Acme-Nashville	Order forecast					100.00	PC	15-M
<input type="checkbox"/>	165174	165174 -	5	5A	Fleetguard	MPT	Acme	Acme-	Purchase order	PO-5196	1		1	75.00	PC	19-M

Similarly, you can search for a specific Order Type i.e. Purchase order, Order forecast, PO Acknowledgement, etc

ORACLE Collaborative Planning

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Home Exceptions **Planning** Admin

Horizontal View **Vertical View** | VMI | Forecast Comparison | Create Order | Planner Workbench | Custom View

Vertical View

Search

Item: 165174 Order Type: Purchase order

Customer item: Order Number: Supplier item: Go

Views

View: Go Personalize

Select Object: Exception Details Order Details Save | Export All

Select All | Select None

Select Item	Item Description	Part Rev No	Drawing Rev No	Customer	Customer Site	Supplier	Supplier Site	Order Type	Order Number	PO Rev Number	Release Number	Line Number	Quantity	UOM	Expected Receipt Date	Unit Price	Cur
<input type="checkbox"/>	165174 165174 - CATLST CERAMIC 300 7.50 OD X 5.20 L	5	5A	Fleetguard	MPT	Acme Chemicals	Acme-Nashville	Purchase order	PO-5196	1		1	75.00	PC	19-May-2006	1.1111	US
<input type="checkbox"/>	165174 165174 - CATLST CERAMIC 300 7.50	5	5A	Fleetguard	MPT	Acme Chemicals	Acme-Nashville	Purchase order	PO-52220061			1	50.00	PC	22-May-2006	1.1111	US

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

ORACLE Collaborative Planning

Home Logout Preferences Help

Home Exceptions **Planning** Admin

Horizontal View **Vertical View** | VMI | Forecast Comparison | Create Order | Planner Workbench | Custom View

Pegging Details

Views

View: Go Personalize

Expand All | Collapse All

Focus Order	Item (Description)	Order Type	Need By Date	Scheduled Receipt Date	Day
PO-52220061	165174 (165174 - CATLST CERAMIC 300 7.50 OD X 5.20 L)	Purchase order	22-May-2006	11-Mar-9187	
PO-52220061	165174 (165174 - CATLST CERAMIC 300 7.50 OD X 5.20 L)	PO Acknowledgement		22-May-2006	

One can also search for a specific PO number by entering the PO number in the 'Order Number' field as shown below.

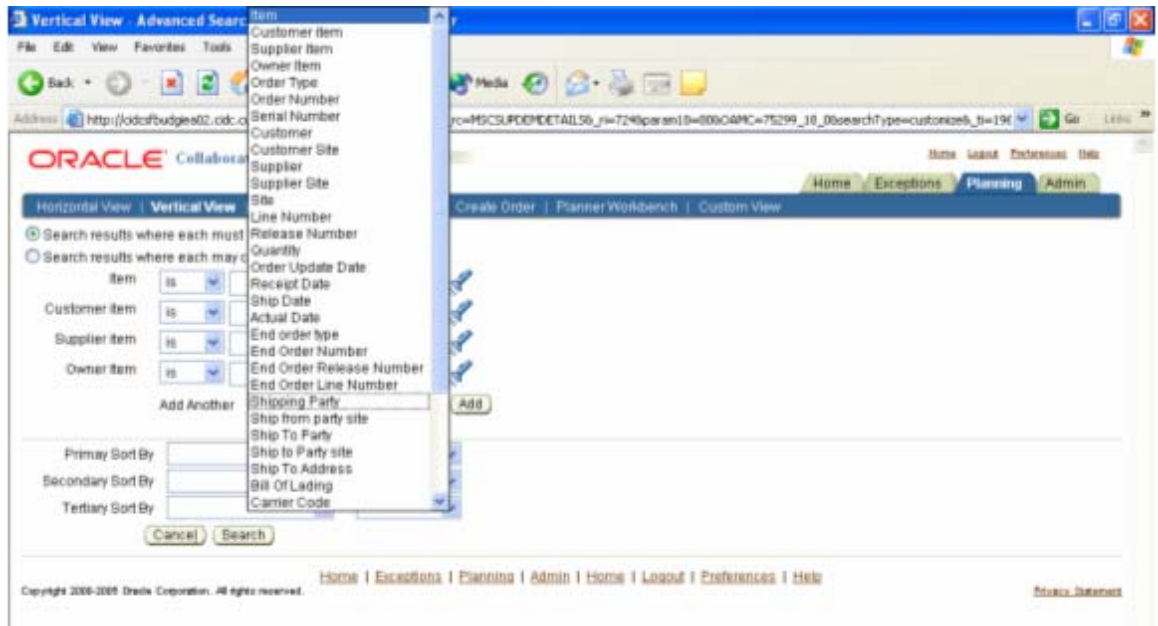
The screenshot shows the Oracle Collaborative Planning interface. At the top, there is a navigation bar with 'ORACLE Collaborative Planning' and links for 'Home', 'Logout', 'Preferences', and 'Help'. Below this is a secondary navigation bar with 'Horizontal View', 'Vertical View', 'VM', 'Forecast Comparison', 'Create Order', 'Planner Workbench', and 'Custom View'. The main area is titled 'Vertical View' and contains a search form. The search form has fields for 'Item', 'Customer item', and 'Supplier item', each with a 'Go' button. There are also 'Order Type' and 'Order Number' fields. The 'Order Number' field contains the value 'PO-52220061' and is highlighted with a red rectangle. To the right of the search form is a button labeled 'Advanced Search', which is circled in red. Below the search form is a 'Views' section with a 'View' dropdown and 'Go' and 'Personalize' buttons. At the bottom, there is a table with columns for 'Select Item', 'Item Description', 'Part Rev', 'Drawing / Rev No', 'Customer', 'Customer Site', 'Supplier', 'Supplier Site', 'Order Type', 'Order Number', 'PO Rev Number', 'Release Line Number', 'Quantity', 'UOM', and 'Expect Date'. The table contains two rows of data for item 165174.

Select Item	Item Description	Part Rev	Drawing / Rev No	Customer	Customer Site	Supplier	Supplier Site	Order Type	Order Number	PO Rev Number	Release Line Number	Quantity	UOM	Expect Date
<input type="checkbox"/>	165174 - CATLST CERAMIC 300 7.50 OD X 5.20 L	5	5A	Fleetguard	MPT	Acme Chemicals	Acme-Nashville	Purchase order	PO-52220061	1	1	50.00	PC	22-Ma
<input type="checkbox"/>	165174 - CATLST CERAMIC 300 7.50	5	5A	Fleetguard	MPT	Acme Chemicals	Acme-Nashville	Purchase order	PO-52220061	1	2	75.00	PC	22-Ma

2. Advanced Search

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

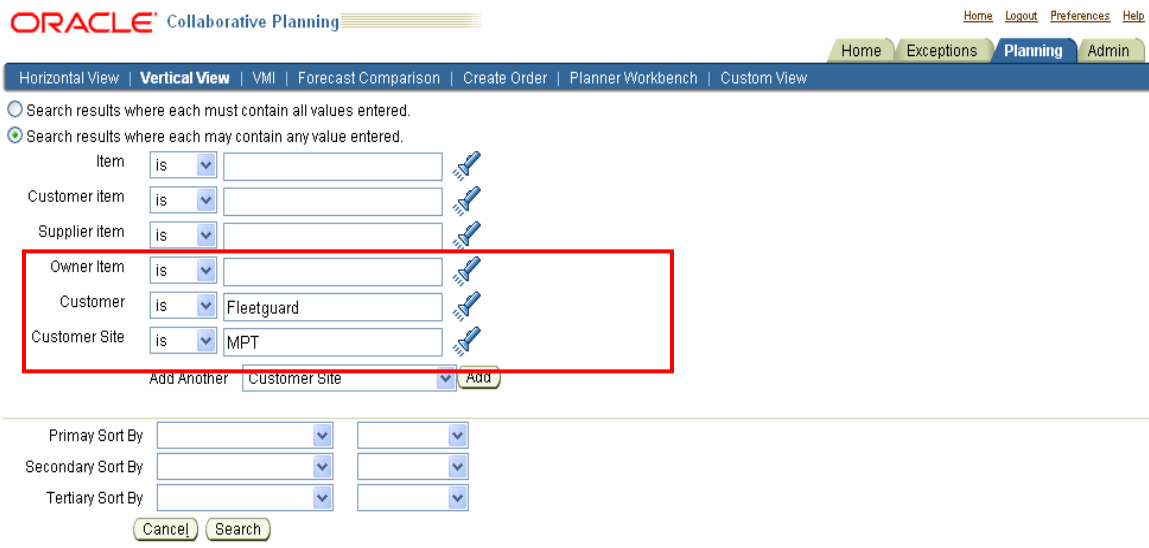
Then select the desired values from the LOV for each search parameter and click on the 'Search' button.



You can perform the search by selecting one of the below options:

1. Search results where each must contain all values entered. OR
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

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

Item is

Customer Item is

Supplier Item is

Owner Item is

Customer is

Customer Site is

Add Another Customer Site

Primary Sort By Receipt Date

Secondary Sort By Item

Tertiary Sort By

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

Vertical View

Search

Item Order Type

Customer item Order Number

Supplier item

Views

View

Select Object: |

|

Select	Item	Item Description	Part Rev	Drawing / Rev No	Customer	Customer Site	Supplier	Supplier Site	Order Type	Order Number	PO Rev Number	Release Line Number	Quantity	UOM	Expect Receipt Date
<input type="checkbox"/>	165174	165174 - CATLST CERAMIC 300 7.50 OD X 5.20 L			Fleetguard	ARC	Acme Chemicals	Acme-Nashville	Order forecast				200.00	PC	15-May
<input type="checkbox"/>	165174	165174 - CATLST CERAMIC 300 7.50 OD X 5.20 L			Fleetguard	MPT	Acme Chemicals	Acme-Nashville	Order forecast				100.00	PC	15-May