# GREENFIELD

# CP2 – Collaborative Planning (CP) Upload Template

31-October-2017
Update:  01 Jan 2018

# CP2 – Collaborative Planning (CP) Upload Template

• **MSI is providing a new download/upload template to facilitate an easier population of Supplier Commits.**

## Key Changes:

❖ 26 weeks Plan Order / Supplier Commit Horizon
❖ Horizontal View of Data
❖ Upload functionality direct from Macro Excel
❖ Latest Supplier Commits are made available in Download Template.
❖ Upload Template will overwrite existing Supplier Commits

## Pre-requisite

❖ There is a one time setup in your Microsoft Excel to run Oracle Web ADI Macro

❖ Please refer to instructions in the Supplier Portal: Training Tab.
        RE: Oracle Web ADI Macro Excel Setups

# CP2 – Collaborative Planning (CP) Upload Template

- **There are 2 steps to the new Supplier Commit**

1) Prepare your Plan Orders, Supplier Commit template in Horizontal View
   This would generate the data into a Horizontal View and bring the latest Supply Commits in.

2) Prepare your Upload Template.
   Provide your latest Supply Commits and Upload from Excel File directly.

# CP2 – Collaborative Planning (CP) Upload Template

- **Prepare your Plan Orders, Supplier Commit template in Horizontal View**
- Run the Program "XXMSI CP Custom Horizontal Data Preparation"

## Navigation
 Collaborative Planning  -> Supply Chain Collaboration Planner - >
                          -> View and Run Requests -> Submit Request

# CP2 – Collaborative Planning (CP) Upload Template

- Insert Program Name: XXMSI CP Custom Horizontal Data Preparation
- You can use the Magnifying Glass Search Capability



- Select "Continue" When Program Name pops up
- In Following Page – Click "Submit"

# CP2 – Collaborative Planning (CP) Upload Template

- Upon Submit you will get a pop up notification of your Request ID
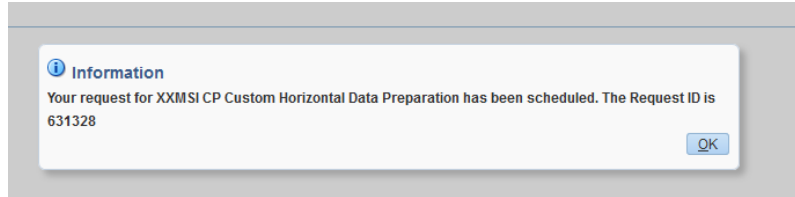


- Your Template in Horizontal view is ready once Request is Completed / Normal.



- Next - > Download your Template.

- **Downloading and Preparing your Supply Commit Template for Upload**

## Navigation

Collaborative Planning  -> Supply Chain Collaboration Planner - >

 -> MSI CP Supply Commit Upload -> Create Document
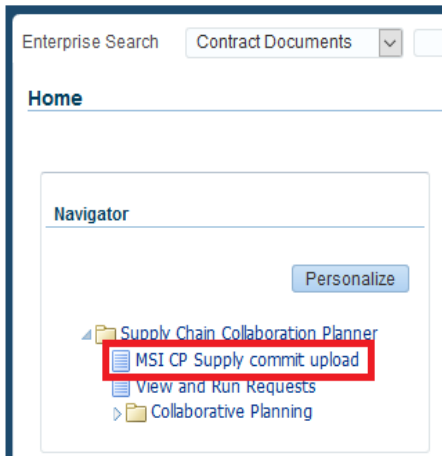


A file will be downloaded to your Desktop - > Open the Macro File

**Important:** Allow the Macro File to be Completed Successfully before moving to another Excel Spreadsheet or Web Browser.

❖ Once Template is ready you will get the below confirmation



❖ This is the Template where you will get an extract of Planned Orders and latest Supplier Commits

Please keep a weekly copy of each Monday's Planned Orders & Supplier Commits for retention purposes.
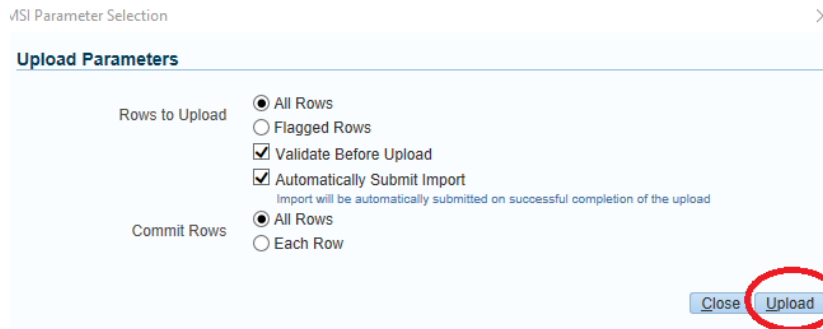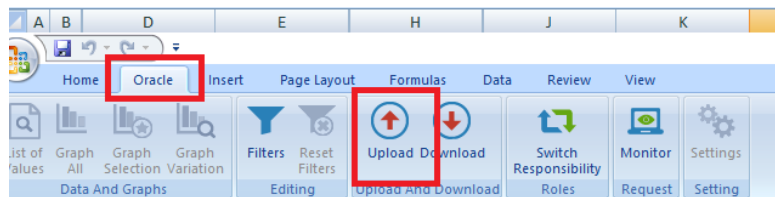
# CP2 – Collaborative Planning (CP) Upload Template

• Provide your Supply Commit against the Weekly Planned Orders.

| Upl | ITEM_NAME | ITEM_DESC | CUSTOMER_SITE | SUPPLIER_NAME | SUPPLIER_SITE_CC | PUBLISHER_NAME | PUBLISHER_SITE | ORDER_TYPE | WEEK1 | WEEK2 | WEEK3 | WEEK4 | WEEK |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | Supplier A | | | | | 30-OCT-17 | 06-NOV-17 | 13-NOV-17 | 20-NOV-17 | 27-NC |
| | 85007012001 | MTP8X0EX SHORT | PRD:DE2 | Supplier A | 999 | My Company | PRD:DE2 | Planned order | 0 | 0 | 0 | 0 | 0 |
| | 85007012001 | MTP8X0EX SHORT | PRD:DE2 | Supplier A | 999 | Supplier A | 999 | Supply commit | 100 | 30 | 30 | 30 | 30 |
| | 85012031001 | ANTENNA WHIP 38 | PRD:DE2 | Supplier A | 999 | My Company | PRD:DE2 | Planned order | 0 | 0 | 12851 | 2147 | 1894 |
| | 85012031001 | ANTENNA WHIP 38 | PRD:DE2 | Supplier A | 999 | Supplier A | 999 | Supply commit | 100 | 30 | 30 | 30 | 30 |
| | 85012033001 | ANTENNA STUBBY | PRD:DE2 | Supplier A | 999 | My Company | PRD:DE2 | Planned order | 0 | 0 | 16925 | 1420 | 1335 |
| | 85012033001 | ANTENNA STUBBY | PRD:DE2 | Supplier A | 999 | Supplier A | 999 | Supply commit | 31 | 30 | 30 | 30 | 30 |
| | 85012033001 | ANTENNA STUBBY | PRD:MY2 | Supplier A | 001 | My Company | PRD:MY2 | Planned order | 0 | 0 | 300 | 0 | 0 |
| | 85012033001 | ANTENNA STUBBY | PRD:MY2 | Supplier A | 001 | Supplier A | 001 | Supply commit | | | | | |
| | 85012056001 | ANTENNA STUBBY, | PRD:DE2 | Supplier A | 999 | My Company | PRD:DE2 | Planned order | 0 | 0 | 8549 | 806 | 740 |

• Once your Upload Template is ready - > you may upload directly from the Template.

❖ In your Excel Header - > Oracle - > Upload -> (Pop Up Box) -> Upload

# CP2 – Collaborative Planning (CP) Upload Template

**Important:**

Please do not navigate out from the Pop Up Upload Screen until confirmation of upload success.  If you navigate out from the Excel Macro while file is being processed – it might impact upload status.



•Upon upload this will automatically schedule 2 programs in the background

      (i) Supply Chain Collaboration Load

      (ii) Supply Chain Event Manager

# CP2 – Collaborative Planning (CP) Upload Template

- **View Status of Upload Request**

(a) Via the Excel Upload - > Excel - > Oracle - > Monitor



Always recheck in CP that Supply Commits are updated successfully

(b) Collaborative Planning - > View and Run Requests

## Upload File - Helpful Hints

❖ If there is a need to do any manipulations (calculations, inserting rows, etc) while preparing your Upload Template -> do not do these directly on the excel macro upload file. It is highly suggested to copy paste the Data into a separate Excel File. Amend as necessary and Paste Special (Value) the impacted cells back into the Upload Macro Template.

❖ Upload Template should not have Formula calculations

❖ Upload Template will only consider Supply Commits for upload. Please ensure Supply Commits have the correct "PUBLISHER_NAME" and "PUBLISHER_SITE" in upload template.

❖ It is recommended not to re-use a previous Template. Always generate the latest Horizontal View / Supply commit by generating "XXMSI CP Custom Horizontal Data Preparation"

❖ Supply Commits will overwrite all existing Supply Commit values

# CP2 – Collaborative Planning (CP) Upload Template

## Upload File - Helpful Hints

❖ Leaving a Supply Commit cell "BLANK" in Upload Template will overwrite existing Supply Commit to "0/Zero"

❖ Template would only contain items with Planned Orders

❖ In final upload template – do not remove / hide any columns

❖ Download the Data each Monday for retention purpose.

❖ ~~If there's 10 Items for the week with Planned Orders, and only 9 items were updated back, the 1 item that was not in Upload Template will have Supplier Commits wiped out.~~

❖ Update: 06-Jan-2018:
   New upload logic will only consider the Items that exists in the upload template.
   If you have downloaded 20 items, removed 18 items, and updated the Supply commits for balance
   2 items, only those 2 items will have the Supply Commit updated.

- **Deleting off Supply Commits.**

- If there is a need to delete off all Supply Commits you may run the program:
'XXMSI CP Purge Supply commit records".
Navigate to View and Run Requests - > Submit Requests.

- This will wipe off all existing Supply Commits.

- You may also upload a Template with Empty/Blank Supply Commits to remove out existing Supply Commits

❖IMPORTANT NOTES

• Do ensure you provide Supply Commits to CP by Tuesday 5pm CST each week

• MSI's liability is limited to the lead-time of Planned Order items.

• Horizontal View has a Date of Monday of the week.
  If you are using Vertical View , it has a Date of Friday of the week.
  Your Supply Commits using whichever view, would assume the delivery to dock each Monday
  of the week.

# CP2 – Collaborative Planning (CP) Upload Template

## UPDATE: 06 JAN 2018

❖ New upload logic will only consider the Items that exists in the upload template.
If you have downloaded 20 items, removed 18 items, and updated the Supply Commits for the balance 2 items, only those 2 items will have the Supply Commit updated.

In the previous logic, uploading the 2 items above will have the balance 18 items Supply Commits wiped out. This has now been changed effective 06 Jan 2018.