

Oracle® Retail Item Planning

Release Notes

Release 13.2.1

E18349-01

October 2010

Oracle Retail Item Planning is part of an overall planning process that involves planning at multiple levels of the product hierarchy. The planning process is an ongoing process whereby the manner in which each step is completed affects the following step, and prior performance influences plans for future performance. Planning takes input from multiple parties, and good communication enhances the process so that it can help drive a financial roadmap for success. Multiple versions of the plan are created to benchmark success as well as provide insight to opportunities and risk for the in-season period.

Overview of the Fashion Planning Bundle

The Fashion Planning Bundle is the integration of Item Planning (IP), Clearance Optimization Engine (COE), Assortment Planning (AP), Merchandise Financial Planning (MFP), and Size Profile Optimization (SPO) as a full-suite planning solution for fashion retailers.

Hardware and Software Requirements

See the *Oracle Retail Item Planning Installation Guide* for information about the following:

- Hardware and software requirements
- Oracle Retail application software compatibility information

Upgrade Note

Due to the introduction of new hierarchies and dimensions, Item Planning is not upgradeable from previous versions to 13.2.1. You must perform a full installation of Item Planning in order to accommodate these changes. For information on performing a full installation, see the *Item Planning Installation Guide*.

Functional Enhancements

IP 13.2.1 includes the following functional enhancements.

Streamlined Preseason Item Plan Seeding

To help retailers who do not use the Assortment Planning application create the preseason item plan, this release of Item Planning has been streamlined based on a parameter-based approach to seeding the plan.

The preseason sales plan has more robust seeding options. In addition to the existing options of seeding from Last Year, Adjusted Last Year, and Like Item, there is a new option: seeding from item plan parameters. The new Item Plan Parameters option includes the ability to set lifecycle dates, assign a lifecycle curve for the full price lifecycle, and define a clearance cadence.

This is supplemented by a detailed promotion planning process based on a defined promotion calendar. Each promotion has an associated discount and a lift that is validated and can be edited by the user. Multiple simultaneous promotions may be applied to each item in a given week.

Sales planning is followed by a standard receipt flow logic that optimizes store receipts based on presentation minimums, safety stock, delivery frequency, and store lead times.

The calculation for clearance sales units is now based on a sell-off percentage of each clearance week's beginning inventory.

Shrink and other miscellaneous inventory transactions are now incorporated into Item Planning.

Single Workbook for Item Planning

The preseason and in-season planning processes in Item Planning have been aligned so that all planning can be performed within one workbook, rather than maintaining separate workbooks for preseason and in-season workflows. This new workbook is named Item Planning.

In addition, the number of tabs and worksheets in this workbook have now been reduced based on an improved workflow and predefined measure profiles. This eliminates the need for users to create a completely new workbook to review in-season performance.

Note: Within the RPAS Fusion Client, this single Item Planning workbook is accessible through two separate taskflow activities: Preseason and In-Season. In addition, a new taskflow has been created to reflect the workflow within the RPAS Classic Client.

Store Maintenance

For retailers who interface with the Assortment Planning application, this release includes a new workbook that displays store clustering information. This allows users to view the store cluster for each store and item for the lifecycle of the item. This is based on the class/buying period level clusters in Oracle Retail Assortment Planning.

Item Maintenance

A more powerful Item Maintenance workbook has been introduced to support the following tasks:

- Review Item Attributes. This is useful for retailers who have implemented an interface to the Assortment Planning application. Retailers can review the attributes of the items in Item Planning.
- Create Placeholder Items and Define Item Attributes. This is useful for retailers who do not interface with Assortment Planning and intend to use Item Planning as the starting point. Retailers can create placeholder items and formalize them at a later time. Retailers can perform all preseason activities for placeholders items.
- Like Item Maintenance. This is useful for retailers who want to choose a period of time from which the like item's history is copied for new or placeholder items.

Reconciliation with Merchandise Financial Planning

This release of Item Planning includes several enhancements to enable accurate comparison and reconciliation with MFP.

- The item planning process now includes Sales by Type and Markdowns by Type measures.
- Several metrics such as Shrink, Misc In, and Misc Out have been included.
- The concept of Value Added Tax (VAT) has been introduced, and therefore Sales Net VAT is available.
- Gross Margin and Gross Profit calculations have been updated to incorporate VAT.
- Several variance measures have been added as well as new measure profiles that mirror the comparisons between MFP to Item Planning.

Technical Enhancements

IP 13.2.1 includes the following technical enhancements.

Updated Build Script

The RPAS utility copyDomain has changed and now includes a -relativizePaths option, which updates the existing master and subdomain paths references to relative paths. This option replaces calling the copyDomain utility with only a source domain specified. The IP scripts have been updated to use the new option where applicable.

New Hierarchies

The following new hierarchies have been added to IP:

- **Seasonality (AT1H):** This hierarchy has one dimension called seasonality. The purpose of this hierarchy is to associate seasonality with an item. This allows users to sort and view items by seasonality, using the dimension attributes. It also provides better integration between Item Planning and Assortment Planning, both of which share this hierarchy. The integration scripts between AP and IP export the item-seasonality map from AP to IP.
- **Price-Tier (AT2H):** This hierarchy has one dimension called price tier. The purpose of this hierarchy is to associate a price tier with an item. This allows users to sort and view items by price tiers using the dimension attributes. It also provides better integration between Item Planning and Assortment Planning, both of which share this hierarchy. The integration scripts between AP and IP export the item-price tier map from AP to IP.
- **Size (SIZH):** This hierarchy has two dimensions: size and size range. The main purpose of this hierarchy is to associate size range with an item. This allows users to sort and view items by size range using the dimension attributes. It also provides better integration between Item Planning and Assortment Planning, both of which share this hierarchy. The integration scripts between AP and IP export the item-size range map from AP to IP.
- **Curve Library (LIBH):** The hierarchy has one dimension called curve. This is used to define a sales curve over time for an item. This is needed for the new parameter-based approach to Item Planning.
- **Week Of Year (WOY2):** This hierarchy has one dimension called Week of Year. This is needed for the new parameter-based approach to Item Planning. It provides a way to define sales curves by week of year.
- **Promotion (PROM):** This hierarchy has one dimension called promotion. The purpose of this hierarchy is to define promotions for items. This is needed for the new parameter-based approach to Item Planning.
- **Clearance Cadence (CDNC):** This hierarchy has one dimension called Clearance Cadence. The purpose of this hierarchy is to define a clearance cadence with an item. This is needed for the new parameter-based approach to Item Planning.

Zone and Price Zone Added to Location Hierarchy

Two dimensions, zone and price zone, have been added to the location hierarchy. Prior to 13.2.1, the location hierarchy was structured accordingly:

Company
Chain
Channel
Store

The new hierarchy structure includes zone and price zone:

Company
Chain
Channel
Zone
Price Zone
Store

Known Issues

The following noteworthy defect fixes and enhancements are included in IP 13.2.1.

Known Issue/Defect	Defect Number
When seeding sales into the item plan, you must set all future weeks to zero for all the sales types. If this is not followed, any non-zero values that were seeded earlier or entered remain, and effectively the newly seeded values are in addition to the earlier seeded ones.	10149143

Supplemental Documentation at My Oracle Support

The following document is available through My Oracle Support. Access My Oracle Support at the following URL:

<https://support.oracle.com>

Oracle Retail Fashion Planning Bundle Reports Documentation (Note ID 1132783.1)

The Oracle Retail Fashion Planning Bundle Reports package includes role-based Oracle Business Intelligence (BI) Enterprise Edition (EE) reports and dashboards that provide an illustrative overview highlighting the Fashion Planning Bundle solutions. These dashboards can be leveraged out-of-the-box or can be used along with other dashboards and reports that may have already been created to support a specific solution or organizational needs. This package includes dashboards for the Assortment Planning, Item Planning, Item Planning Configured for COE, Merchandise Financial Planning Retail Accounting, and Merchandise Financial Planning Cost Accounting applications.

The Oracle Retail Fashion Planning Bundle Reports documentation set includes the following documents that describe how you can install and use the reports and dashboards:

- *Oracle Retail Fashion Planning Bundle Reports Installation Guide* – This guide describes how you can download and install the Fashion Planning Bundle reports. This guide is intended for system administrators and assumes that you are familiar with the Oracle Retail Predictive Application Server (RPAS) and Oracle BI EE.
- *Oracle Retail Fashion Planning Bundle Reports User Guide* – This guide describes the reports and dashboards included for the Oracle Retail Fashion Planning Bundle solutions.

Related Documentation

For more information, see the following documents in the Oracle Retail Item Planning 13.2.1 documentation set:

- *Oracle Retail Item Planning Installation Guide*
- *Oracle Retail Item Planning Operations Guide*
- *Oracle Retail Item Planning User Guide for the RPAS Classic Client*
- *Oracle Retail Item Planning User Guide for the RPAS Fusion Client*

For more information about the Fashion Planning Bundle applications see the following documentation sets:

- Oracle Retail Item Planning Configured for COE documentation
- Oracle Retail Clearance Optimization Engine documentation
- Oracle Retail Assortment Planning documentation
- Oracle Retail Merchandise Financial Planning documentation
- Oracle Retail Size Profile Optimization documentation

For more information about the RPAS Fusion Client, see the following documents in the Oracle Retail Predictive Application Server 13.2.1 documentation set:

- *Oracle Retail Predictive Application Server Release Notes*
- *Oracle Retail Predictive Application Server Licensing Information*
- *Oracle Retail Predictive Application Server Installation Guide*
- *Oracle Retail Predictive Application Server Administration Guide for the RPAS Classic Client*
- *Oracle Retail Predictive Application Server Administration Guide for the RPAS Fusion Client*
- *Oracle Retail Predictive Application Server User Guide for the Classic Client*
- *Oracle Retail Predictive Application Server Online Help for the Classic Client*
- *Oracle Retail Predictive Application Server Configuration Tools User Guide*
- *Oracle Retail Predictive Application Server Configuration Tools Online Help*
- *Oracle Retail Predictive Application Server User Guide for the Fusion Client*
- *Oracle Retail Predictive Application Server Online Help for the Fusion Client*

For more information about RPAS and the ODI Enabled Integration, see the following documentation sets:

- Oracle Retail ODI Enabled Integration documentation
- Oracle Data Integrator documentation
- Oracle Retail Predictive Application Server documentation

Previous Releases

For additional information on previous Oracle Retail Item Planning release enhancements and additional information, refer to the release notes and documentation that accompany the previous release.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible to all users, including users that are disabled. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Accessibility standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For more information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

Accessibility of Code Examples in Documentation

Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation

This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/support/contact.html> or visit <http://www.oracle.com/accessibility/support.html> if you are hearing impaired.

Copyright © 2010, Oracle and/or its affiliates. All rights reserved.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this software or related documentation is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

This software is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications which may create a risk of personal injury. If you use this software in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure the safe use of this software. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software in dangerous applications.

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

This software and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Licensing Note: This media pack includes a Restricted Use license for Oracle Retail Predictive Application Server (RPAS) - Enterprise Engine to support Oracle® Retail Item Planning only.

Value-Added Reseller (VAR) Language

Oracle Retail VAR Applications

The following restrictions and provisions only apply to the programs referred to in this section and licensed to you. You acknowledge that the programs may contain third party software (VAR applications) licensed to Oracle. Depending upon your product and its version number, the VAR applications may include:

(i) the software component known as **ACUMATE** developed and licensed by Lucent Technologies Inc. of Murray Hill, New Jersey, to Oracle and imbedded in the Oracle Retail Predictive Application Server - Enterprise Engine, Oracle Retail Category Management, Oracle Retail Item Planning, Oracle Retail Merchandise Financial Planning, Oracle Retail Advanced Inventory Planning, Oracle Retail Demand Forecasting, Oracle Retail Regular Price Optimization, Oracle Retail Size Profile Optimization, Oracle Retail Replenishment Optimization applications.

(ii) the **MicroStrategy** Components developed and licensed by MicroStrategy Services Corporation (MicroStrategy) of McLean, Virginia to Oracle and imbedded in the MicroStrategy for Oracle Retail Data Warehouse and MicroStrategy for Oracle Retail Planning & Optimization applications.

(iii) the **SeeBeyond** component developed and licensed by Sun Microsystems, Inc. (Sun) of Santa Clara, California, to Oracle and imbedded in the Oracle Retail Integration Bus application.

(iv) the **Wavelink** component developed and licensed by Wavelink Corporation (Wavelink) of Kirkland, Washington, to Oracle and imbedded in Oracle Retail Mobile Store Inventory Management.

(v) the software component known as **Crystal Enterprise Professional and/or Crystal Reports Professional** licensed by SAP and imbedded in Oracle Retail Store Inventory Management.

(vi) the software component known as **Access Via™** licensed by Access Via of Seattle, Washington, and imbedded in Oracle Retail Signs and Oracle Retail Labels and Tags.

(vii) the software component known as **Adobe Flex™** licensed by Adobe Systems Incorporated of San Jose, California, and imbedded in Oracle Retail Promotion Planning & Optimization application.

(viii) the software component known as **Style Report™** developed and licensed by InetSoft Technology Corp. of Piscataway, New Jersey, to Oracle and imbedded in the Oracle Retail Value Chain Collaboration application.

(ix) the software component known as **DataBeacon™** developed and licensed by Cognos Incorporated of Ottawa, Ontario, Canada, to Oracle and imbedded in the Oracle Retail Value Chain Collaboration application.

You acknowledge and confirm that Oracle grants you use of only the object code of the VAR Applications. Oracle will not deliver source code to the VAR Applications to you. Notwithstanding any other term or condition of the agreement and this ordering document, you shall not cause or permit alteration of any VAR Applications. For purposes of this section, "alteration" refers to all alterations, translations, upgrades, enhancements, customizations or modifications of all or any portion of the VAR Applications including all reconfigurations, reassembly or reverse assembly, re-engineering or reverse engineering and recompilations or reverse compilations of the VAR Applications or any derivatives of the VAR Applications. You acknowledge that it shall be a breach of the agreement to utilize the relationship, and/or confidential information of the VAR Applications for purposes of competitive discovery.

The VAR Applications contain trade secrets of Oracle and Oracle's licensors and Customer shall not attempt, cause, or permit the alteration, decompilation, reverse engineering, disassembly or other reduction of the VAR Applications to a human perceivable form. Oracle reserves the right to replace, with functional equivalent software, any of the VAR Applications in future releases of the applicable program.