

**Oracle® Retail Item Planning Configured for COE**  
Release Notes  
Release 13.0.2

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## Value-Added Reseller (VAR) Language

### Oracle Retail VAR Applications

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- (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 and Oracle Retail Demand Forecasting 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 Store Inventory Management.
- (v) the software component known as **Crystal Enterprise Professional and/or Crystal Reports Professional** licensed by Business Objects Software Limited (“Business Objects”) and imbedded in Oracle Retail Store Inventory Management.
- (vi) the software component known as **Access Via**<sup>TM</sup> 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**<sup>TM</sup> 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**<sup>TM</sup> 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**<sup>TM</sup> developed and licensed by Cognos Incorporated of Ottawa, Ontario, Canada, to Oracle and imbedded in the Oracle Retail Value Chain Collaboration application.



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# Preface

A Release Notes document can include some or all of the following sections, depending upon the release:

- Overview of the release
- Functional, technical, integration, and performance enhancements
- Assumptions
- Fixed defects
- Known issues

## Audience

Release Notes are a critical communication link between Oracle Retail and its retailer clients. There are four general audiences for whom a Release Notes document is written:

- Retail clients who want to understand the contents of this release
- Staff who have the overall responsibility for implementing Oracle Retail Document Template in their enterprise
- Business analysts who want high-level functional information about this release
- System analysts and system operation personnel who want high-level functional and technical content related to this release

## Related Documents

For more information, see the following documents in the Oracle Retail Item Planning Configured for COE Release 13.0.2 documentation set:

- *Oracle Retail Item Planning Configured for COE Installation Guide*

or more information on the Fashion Planning Bundle applications, see the following documents:

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

## Customer Support

<https://metalink.oracle.com>

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

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## Review Patch Documentation

If you are installing the application for the first time, you install either a base release (for example, 13.0) or a later patch release (for example, 13.0.2). If you are installing a software version other than the base release, be sure to read the documentation for each patch release (since the base release) before you begin installation. Patch documentation can contain critical information related to the base release and code changes that have been made since the base release.

## Oracle Retail Documentation on the Oracle Technology Network

In addition to being packaged with each product release (on the base or patch level), all Oracle Retail documentation is available on the following Web site (with the exception of the Data Model which is only available with the release packaged code):

[http://www.oracle.com/technology/documentation/oracle\\_retail.html](http://www.oracle.com/technology/documentation/oracle_retail.html)

Documentation should be available on this Web site within a month after a product release. Note that documentation is always available with the packaged code on the release date.

## Conventions

**Navigate:** This is a navigate statement. It tells you how to get to the start of the procedure and ends with a screen shot of the starting point and the statement “the Window Name window opens.”

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**Note:** This is a note. It is used to call out information that is important, but not necessarily part of the procedure.

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This is a code sample  
It is used to display examples of code

[A hyperlink appears like this.](#)

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# Release Notes

## Overview

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.

This continual process can be defined as two main steps: Pre Season planning and In Season planning. The Pre Season planning objective is to create the benchmark against which to measure in season performance. This plan benchmark is the Original Plan (OP). This plan version should not be adjusted once the planning season has begun.

The Pre Season planning process begins with the creation of a baseline with which to plan. This baseline can be derived from last year history, or adjusted last year history. Once the baseline is set, the balance set of measures is planned. This planning occurs at multiple levels of the product hierarchy. The role of Item Planning is to break out the Merchandise Financial Plan at the Subclass, or lowest, hierarchy level to more definable plans at the style or style/color level. This lower level of detail assists in providing insight for the Item Planner when in season on areas of opportunity and risk.

Once in season, the process of planning switches over to In Season planning. Now the Item Planner focuses on in season management. The Item Planner uses the OP plan as a benchmark against which to measure opportunity and risk. The plan version that the Item Planner uses is the Working Plan (WP). When the Item Planner is ready to self-approve the WP plans, the Planner approves to the Current Plan (CP) version.

## Item Planning Configured for COE

Oracle Retail Item Planning Configured for COE (IP/COE) facilitates the translation of merchandise financial plans into execution level, item driven strategies to be followed throughout the life of a product. It represents the bottom-up planning process, complementing and working in concert with the top-down financial plans. By providing weekly visibility into item performance and financial targets, the item planning process increases the likelihood that merchandising strategies are successfully executed within the financial plan parameters.

In addition to the basic item planning process described above, Item Planning Configured for COE supports in-season markdown optimization, analysis, and execution. This is achieved through batch integration and a real-time service call to the Clearance Optimization Engine (COE). COE represents an effort to open up the markdown optimization engine for use in external applications such as IP/COE that need an in-season price recommendation and a forecast that accounts for planned promotions and future markdowns and product life cycle. The IP/COE exit strategy process has been configured to load the weekly batch forecasts calculated in COE. Based on this "Recommended" information, the user has the ability to run a what-if scenario to the COE optimization engine. In real-time, the user will receive a "Revised" forecast. Within IP/COE, analysis of the key planning metrics using both the "Recommended" and "Revised" forecast will take place in order to execute the optimal markdown recommendation.

## 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.

## Release Information

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**Note:** This is the first release of Item Planning Configured for COE.

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### Hardware and Software Requirements

Please refer to the *Item Planning Configured for COE Installation Guide* for information about the following:

- Hardware and software requirements
- Oracle Retail application software compatibility

## Assumptions

The following table contains assumptions associated with the current release.

Assumption
The common hierarchy files for Product, Location, and Calendar are shared among Item Planning, Assortment Planning, Merchandise Financial Planning, and Size Profile Optimization. The common hierarchy is not available for Item Planning Configured for COE. For more information, see the “Build Scripts” chapter in the <i>Item Planning Operations Guide</i> , the <i>MFP Operations Guide</i> , the <i>Size Profile Optimization Implementation Guide</i> , or the <i>Assortment Planning Implementation Guide</i> .
The COE application is designed for use with the Item Planning Configured for COE version of the Item Planning application.

## Known Issues/Defects

The following table contains issues or defects for the current release.

Known Issue/Defect	Defect Number
Wp COE Initial EOL Salvage Markdown R is not calculating.	74
The COE Revised EOP Inventory U is not being calculated correctly. The calculation in the current week should be the Revised Current Inventory minus the Revised Forecasted Sales Units. It appears to only show the Revised Forecasted Sales Units as a negative number. There may be an issue with the fact that the Current Inventory is not by week but the EOP and Sales measure are. We may need a temporary measure that holds Current Inventory at the week level and use that in the calculation for EOP.	100
The calculation of the Revised Clearance Retail Price should only be populated when the value in the previous weeks Revised Clearance Markdown Retail Price Plan is not equal to the current week value of the same measure. The current rule is $IpWpCoRCIRPV = \text{if}(IpWpCoRCMRPPV == \text{lag}(IpWpCoRCMRPPV), IpWpCoRCMRPPV, 0)$ . This should be not equal to instead of equal to.	101
The IP COE User Guide is in development and is not being packaged in the current release.	N/A