

Oracle® Retail Item Planning Configured for COE

Release Notes

Release 13.0.3

February 2009

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.

Item Planning is part of an overall planning process that involves planning at multiple levels of the product hierarchy. The planning process can be thought of as a continual process where each step enhances the following, and prior performance affects plans for future performance. Planning takes input from multiple parties, and excellent 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 to 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 will focus 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 WP (Working Plan). When the Item Planner is ready to self-approve the WP plans, the Planner approves to the Current Plan (CP) version.

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.

Hardware and Software Requirements

The following table provides information about the current release.

Table 1 Hardware and Software Requirements

Release Information	Details
Code Cut-Off Date	January 30, 2009
Supported OS, Server, and Compilers	Sun Solaris 9: gcc 4.1.1 Sun Solaris 10: gcc 4.2.3 AIX 5.3 (TL5 or greater): gcc 4.1.1 HP-UX 11.23 (Itanium): aCC 6.15 Oracle Enterprise Linux 4, Update 5: gcc 4.1.1
Supported OS, Client	Windows NT, 2000, XP, Vista
Required 3rd Party Software	JRE 1.5 (installed on client and server machines). Note that this patch of RPAS is also certified with JRE 1.6, but it is not necessary to upgrade to JRE 1.6 to take this patch.

Assumptions

The following are assumptions associated with the current release.

Common Hierarchy Files

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 most recent version of the *Item Planning Operations Guide*, the *Merchandise Financial Planning Operations Guide*, the *Size Profile Optimization Implementation Guide*, or the *Assortment Planning Implementation Guide*.

Functional Enhancements

Item Planning Configured for COE 13.0.3 includes the following functional enhancements.

Image Display

Image display was added to the Item Planning Workbook. Note that images cannot be assigned to Style-Colors, Styles, and SubClasses.

Menu and Worksheet Name Changes

The "Execute Markdown Decision" custom menu option and the "5. Execute Markdown Decision" worksheet were renamed to "Accept Price Plan" and "5. Accept Price Plan" respectively.

Measure Label Changes

- All COE measures have been updated to remove "Wp" from the labels.
- "COE" has been added to the labels of What-If Optimization measures.
- The labels of the COE measures have been updated to be consistent. All measures that are part of the initial COE optimization are now labeled as "Forecasted".

Dashboard Tab Removed

The Dashboard tab has been removed from the Pre-Season workbook.

Markdown Analysis Worksheets

The measure order on the two Markdown Analysis worksheets has been updated to provide a better view of the optimization measures.

Fixed Issues/Defects

The following table contains issues or defects that have been fixed for the current release.

Table 2 Fixed Issues and Defects

Fixed Issue/Defect	Defect Number
Wp COE Initial EOL Salvage Markdown R was not calculating. This issue has been corrected.	HPQC# 74
The COE Revised EOP Inventory U was not being calculated correctly. This issue has been corrected.	HPQC# 100
The calculation of Revised Clearance Retail Price should only be populated when the value in the previous week's Revised Clearance Markdown Retail Price Plan is not equal to the current week value of the same measure. Previously, the calculation was populating values when the previous weeks value was equal to the current week. This issue has been corrected.	HPQC# 101
The base level of the Calendar wizard has been brought down from Quarter to Week.	8214438
The logic between Regular and Promotional Sales has been changed to allow for Promotional Sales Units when there are no Regular Sales Units. Previously, Promotional Sales would be set to zero if Regular Sales were set to zero.	8210380

Table 2 Fixed Issues and Defects

Fixed Issue/Defect	Defect Number
The Enabled Flags worksheet has been removed from the Dashboard Tab. The measures that were previously on this worksheet are not automatically populated in the calculation rule group.	7822945
The Internal Measures worksheet has been removed from the Dashboard Tab. This tab was intended for internal testing only and was removed for general use.	7815533
COE Revised Clearance Retail % Off was being calculated incorrectly; it was comparing the current ticketed price to the COE Revised Clearance Retail Price. Now, it correctly uses the COE Revised Clearance Retail Price Plan.	7814600
The following measures are now Date measures: <ul style="list-style-type: none">■ Wp COE Revised Projected Exit Week at Revised Sell Thru %■ Wp COE Projected Exit Week at Initial Sell Thru %	7704920

Related Documentation

For more information, see the following documents in the Oracle Retail Item Planning Configured for COE 13.0.3 documentation set:

- *Oracle Retail Item Planning Configured for COE User Guide*
- Oracle Retail Item Planning documentation
- Oracle Retail Predictive Application Server documentation

Previous Releases

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

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