

Oracle® Retail Item Planning Configured for COE

Release Notes

Release 13.0.4

July 2009

Oracle Retail Item Planning Configured for the Clearance Optimization Engine (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 step, and prior performance affects 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 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 Working Plan (WP). When the item planner is ready to self-approve the WP plans, the item 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 receives a revised forecast. Within IP COE, analysis of the key planning metrics, using both the recommended and revised forecasts, takes 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.

Hardware and Software Requirements

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

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

Note: The RPAS Client will not be supported on Windows 2000 after the 13.0.4 release. The RPAS Server will not be supported on Sun Solaris 9 after the 13.0.4 release.

Technical Enhancements

Item Planning Configured for COE 13.0.4 includes the following technical enhancements.

- Security Updates for COE Service Call
- Multi-Item Call to COE Service Call

Security Updates for COE Service Call

In previous release of Item Planning Configured for COE, the user name and password for users in Item Planning had to exactly match a user name and password in COE. In this release, a new security approach is taken. A set of COE system credentials (user name and password) is created in the Item Planning environment using the standard RPAS account management features. All COE service call requests use the COE system credentials to access COE. The COE system credentials are encrypted in the service call, and the specific user name is sent as an informational field. Additional information is provided in the *Oracle Retail Item Planning Operations Guide*.

Multi-Item Call to COE Service Call

The previous releases of Item Planning configured for COE allowed the user to run what-if optimization for multiple items at the same time. To handle this approach, the RPAS special expression parsed through each request and sent them as individual requests to COE. In this release of Item Planning Configured for COE, the COE what-if processing was updated to allow the optimization of multiple items in a single call. The end user should not see any impact from this change.

Fixed Issues/Defects

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

Fixed Issue/Defect	Defect Number
The What-if Price Type and the What-if Price Ladder were defaulting to 0. This issue has been resolved, and they now default to blank.	7704955

Related Documentation

For more information, see the following documents in the Oracle Retail Item Planning Configured for COE 13.0.4 documentation set:

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

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

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