

Oracle® Retail Item Planning Configured for COE

Release Notes

Release 13.2.1

E18358-01

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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 workbook enhances the following, and prior performance affects plans for future performance. Planning takes input from multiple parties, and communication enhances the process to help drive a financial road map 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.

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

Upgrade Note

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

Functional Enhancements

IP COE 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.

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 placeholder 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.

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.

Markdown Analysis

The activities related to Markdown Analysis have been streamlined in the new Markdown Analysis workbook:

- The Markdown Analysis workbook has only the tasks related to Markdown Analysis. All other actions that impact the item plan are exclusively available in the Item Planning workbook.
- The workbook has enhanced features to allow the acceptance of price plans at a price zone level rather than the entire channel. Now, the user can accept a COE-forecast for certain price zones, what-if forecasts for other price zones, and "do nothing" for certain others.
- The Clearance Optimization Engine can recommend markdowns at the price zone level. This gives the user a more accurate picture of the exit strategy.
- Channel-level sales plans can now be spread down to the price zone for the purpose of markdown analysis, which gives the user clearer visibility into the variances to Current Plan (Cp).

- Seeding the item plan based on the newly accepted price plans is retained within the Item Planning workbook in order to take advantage of the additional workflow and validations defined there.
- The number of tabs and worksheets in the RPAS Classic Client and the tasks and steps within the RPAS Fusion Client, as well as their sequence, have been rationalized based on the improved workflow. In addition, predefined measure profiles are available in many worksheets and views.

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 COE 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 COE 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.

Noteworthy Defect Fix

The following noteworthy defect fix is included in IP COE 13.2.1.

Fixed Issue/Defect	Defect Number
Previously, there was no validation to prevent the user from entering a Clearance Price when the What-if price type was percentage-off. This validation is now being enforced to prevent user error.	10150355

Known Issue

The following table contains issues that have been identified for the current release.

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 Configured for COE 13.2.1 documentation set:

- *Oracle Retail Item Planning Configured for COE Installation Guide*
- *Oracle Retail Item Planning Configured for COE User Guide for the RPAS Classic Client*
- *Oracle Retail Item Planning Configured for COE User Guide for the RPAS Fusion Client*
- Oracle Retail Item Planning documentation set

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

- Oracle Retail Item Planning 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 Classic Client*
- *Oracle Retail Predictive Application Server Administration Guide for the 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 Configured for COE release enhancements and additional information, refer to the release notes and documentation that accompany the previous release.

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