Oracle® Retail Item Planning Cloud Service

Release Notes

Release 17.0

E90913-01

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This document highlights the major changes for Oracle Retail Item Planning Cloud Service 17.0.

Overview

Item Planning Cloud Service represents a bottom-up planning process, complementing and working in concert with top-down assortment and merchandise financial plans. By providing the ability to create a pre-season item plan that aligns with assortment and merchandise financial plans and then weekly in-season 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 Cloud Service is designed to address the needs of Grocery, Hardlines, and Fashion. Item Planning Cloud Service contains features to ensure that retailers are able to deliver targeted and hyper-localized assortments and promotions.

Item Planning Cloud Service helps the business to anticipate and proactively manage exceptions by utilizing robust real-time alerts, to highlight and focus a planner's attention on item issues that need immediate attention. In this way, the planner can manage by exception versus searching through entire data sets to locate problems, saving time and resources to focus on important issues. It also provides a dashboard, which provides a visual tool to quickly analyze ups and downs in Sales, Gross Margin, and EOP over pre-season and in-season profiles and also the exceptions in the business.

The Item Planning activity consists of two tasks: Pre-Season and In-Season Item Planning. Pre-season focuses on creating a plan in advance of when the merchandise is going to be sold, and in-season focuses on adjusting the original plan based sales once the season started, as well as factoring in new knowledge about the assortment, completion, promotions or other factors that were not known about during the pre-season. The pre-season and in-season processes also include what-if optimization for pricing decisions to assist the planner in determining optimal markdowns.

Item Planning Cloud Service leverages the features of the powerful Predictive Application Server (RPAS) platform, including visual planning, exception management, and robust What If scenarios.

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Benefits

Item Planning Cloud Service provides the following benefits:

- Exception-driven in-season planning to manage key item performance.

- Pre-season assortment strategy for number of style-color options.

- In-season assortment keep/add/drop capabilities.

- What-if promotional and markdown planning capabilities.

- Dashboard to analyze the ups and downs in Sales, GM, and EOP and review pre-season and in-season exceptions.

- Exception driven process to break item down to SKU (Style-Color-Size) using size profiles.

- Open-to-Buy Reconciliation with merchandise financial plans.

- Unified financial and item strategies.

- A proactive approach towards business trends as opposed to reactive.

- Reduced markdowns.

- Increased profits.

- Increased return on investment.

> **Note:** Because IP Cloud Service uses the Oracle Retail Predictive Application Server (RPAS) platform, Oracle Retail recommends that you review the *Oracle Retail Predictive Application Server Cloud Service Release Notes* for fixed and known issues that may affect the IP Cloud Service.

Oracle Retail Cloud Services and Business Agility

Oracle Retail Item Planning Cloud Service (IPCS) is hosted in the Oracle Cloud with the security features inherent to Oracle technology and a robust data center classification, providing significant uptime. The Oracle Cloud team is responsible for installing, monitoring, patching, and upgrading retail software.

Included in the service is continuous technical support, access to software feature enhancements, hardware upgrades, and disaster recovery. The Cloud Service model helps to free customer IT resources from the need to perform these tasks, giving retailers greater business agility to respond to changing technologies and to perform more value-added tasks focused on business processes and innovation.

Oracle Retail Software Cloud Service is acquired exclusively through a subscription service (SaaS) model. This shifts funding from a capital investment in software to an operational expense. Subscription-based pricing for retail applications offers flexibility and cost effectiveness.

Client System Requirements

The following technology is supported:

- Operating system:

  - Microsoft Windows 7 Professional and Windows 10 with Microsoft Office 2013

    Note: Oracle Retail assumes that the retailer has ensured its Operating System has been patched with all applicable Windows updates.

- Web browsers supported on Microsoft Windows 7 and 10:

  - Mozilla Firefox 52+ ESR

  - Google Chrome 52+

Functional Enhancements

Item Planning Cloud Service leverages the features of the powerful Oracle Retail Predictive Application Server Cloud Edition (RPAS CE) platform, including visual planning, exception management, and robust What If scenarios.

Following is a summary of these and other key features of Item Planning Cloud Service.

Item Lifecycle Planning

Item Planning Cloud Service facilitates management of an item all the way through its lifecycle, from pre-season subclass-level target-setting all the way through in season management down to the item/store level. It enables retailers to quickly realize benefits and keep up with ever-changing customer expectations. Capabilities now include setting targets, identifying breakout of new versus carryover product, determining the number of new options, and setting sales targets by item. Target creation offers complete flexibility that aligns with all retailers' business process; the targets can come from MFP, AP, or be created within IPCS using LY, a demand forecast, or they can be manually created. In season, Item Planning Cloud Service provides subclass-level open to buy reconciliation to immediately address opportunities or issues.

Assortment Strategy Options Planning

Item Planning Cloud Service provides detailed Options planning capabilities, to facilitate plan creation and provide a smart starting point for more detailed Item Planning. Capabilities include:

- Ability to carry over items from prior assortments.

- Establish item-level selling patterns using a variety of sources including like item, last year history, a demand forecast, or the merchandise financial plan.

- Assign product attributes.

- Determine assortment strategy based on space constraints.

- Add images for a visual options planning experience.
- Reconcile against targets.

Markdown Planning

Item Planning Cloud Service provides price and promotion planning capabilities that streamline the layering of events within the context of the sales, inventory, and keep/add/drop assortment planning decisions; reinforce common event structures within the plan; and are supported by standard price elasticity lift and simple optimization models. The capabilities now also include markdown planning, with the flexibility of planning either markdown percentages or price points.

Following is a summary of key price and promotion planning capabilities:

- Management of promotion and markdown event libraries that simplify planning decisions, reinforce event consistency, and provide flexibility to leverage user-specified elasticity-driven or explicitly-defined event lifts.
- Pre-season planning process for incorporating time-phased promotion or markdown series into the sales plan seeding process.
- Enhanced what-if simulation of promotion and markdown event impacts with side-by-side comparison of two (or more) different scenarios, for easy incorporation into the plan.
- Visibility to simple, unconstrained markdown optimization based on price elasticity model to inform markdown planning.

Exception Management in IP Cloud Service

Item Planning Cloud Services introduces additional capabilities for the existing standard, exception-based retailing processes with clear resolution pathways towards prioritized, value-based activities. By automating best practices and adopting exception based reporting, retailers create more space for innovative and artistic thinking. In addition to the automated alert navigation to quickly find and address exceptions and control where alerts should be evaluated, an Exception Dashboard provides a dynamic, visual starting point for exception management.

Exception management processes include:

- Planner guidance to pre-season plan creation where assortment plans exist.
- In-season projected inventory overages (priority 1).
- Low sales trends for under-performing items (priority 2).
- In-season immediate inventory need (priority 1).
- Future inventory need for over-performing or low inventory-availability items (priority 2).

Size-Level Planning

Item Planning Cloud Service facilitates increased margin through proper item planning all the way down to the size level. Optimized store-level size profiles can be imported from Oracle Retail Size Profile Optimization or from another size profile tool, and automation is used to apply them to the item plans before releasing them to the ordering process. Additional prepack capabilities can be leveraged to round the buy into packs which is used to improve supply chain efficiency. Robust exception management through real-time alerts allows the user to efficiently keep an eye on a huge amount of detail without the need for time-intensive analysis.

Known Issues

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

Affected Component	Known Issue/Defect	Defect Number
IPCS Configuration	OTB measure does not currently account for On Order; adjustments made to On Order Adjustment impact OTB, but not EOP.	26649718
IPCS Configuration	Some contextual help links are missing.	26800150
IPCS Configuration	Calendar STD/ BTA Positions and Labels are reflected incorrectly in the UI; it does not distinguish elapsed versus unelapsed weeks.	26836203

Related Documentation

For more information, see the following documents in the Oracle Retail Item Planning Cloud Service Release 17.0 documentation set:

- *Oracle Retail Item Planning Cloud Service Administration Guide*
- *Oracle Retail Item Planning Cloud Service Implementation Guide*
- *Oracle Retail Item Planning Cloud Service User Guide*
- *Oracle Retail Item Planning Cloud Service Starter Kit Guide*
- Oracle Retail Predictive Application Server Cloud Edition documentation

Supplemental Training

The following training is available.

Oracle Retail Learning Subscriptions at Oracle University

The Oracle Retail Learning Subscription is a digital training solution for anyone on your team seeking training on Oracle Retail Products. With the learning subscription you get the key elements of an effective learning program and the conveniences of a digital format, making this training unmatched in the industry.

You get modern learning at its best, such as:

- 12 months of 24/7 access to a comprehensive set of high quality videos delivered by Oracle experts.

- Detailed coverage and step-by-step demonstrations.

- Periodic updates for new features and product enhancements.

- Flexibility to search, access, and learn about specific topics of interest.

The learning subscription enables current users to continually refresh and upgrade their product skills. It also enables new employees with a self-paced learning guide to help them quickly become proficient on Oracle Retail Products.

For training opportunities, see the following web site:

http://www.oracle.com/education

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at
http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit
http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit
http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

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 **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.

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

(iii) 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.

(iv) 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.

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.