Oracle® Retail Advanced Inventory Planning

Release Notes
Release 13.0

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ORACLE

Oracle® Advanced Inventory Planning Release Notes, Release 13.0

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Value-Added Reseller (VAR) Language

(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™** 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™** 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™** 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 **WebLogic™** developed and licensed by BEA Systems, Inc. of San Jose, California, to Oracle and imbedded in the Oracle Retail Value Chain Collaboration application.

(x) the software component known as **DataBeacon™** developed and licensed by Cognos Incorporated of Ottawa, Ontario, Canada, to Oracle and imbedded in the Oracle Retail Value Chain Collaboration application.

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/or performance enhancements
- Assumptions
- Fixed and/or known issues/defects

Because of their brevity, Release Notes do not include chapters, appendices, or a table of contents.

Audience

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

- Retail clients who wish to understand the contents of this release.
- Integrators and implementation staff who have the overall responsibility for implementing Oracle Retail Advanced Inventory Planning into their enterprise.
- Business analysts who are looking for high-level functional information about this release.
- System analysts and system operation personnel who are looking for high-level functional and technical content related to this release.

Related Documents

For more information, see the following documents in the Oracle Retail Advanced Inventory Planning Release 13.0 documentation set:

- *Advanced Inventory Planning Operations Guide*
- *Advanced Inventory Planning Data Management Online - Online Help*
- *Advanced Inventory Planning Data Management Online User Guide*
- *Advanced Inventory Planning Order Management - Online Help*
- *Advanced Inventory Planning Order Management User Guide*
- *Advanced Inventory Planning Data Model Volume 1 Oracle Data Model*
- *Advanced Inventory Planning Data Model Volume 2 Measure Reference Guide*
- *Advanced Inventory Planning Installation Guide*
- *Advanced Inventory Planning Implementation Guide*
- *Advanced Inventory Planning Administration Guide*
- *Advanced Inventory Planning Store Replenishment Planning User Guide*
- *Advanced Inventory Planning Warehouse Replenishment Planning User Guide*

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

Review Patch Documentation

For a base release (".0" release, such as 13.0), Oracle Retail strongly recommends that you read all patch documentation before you begin installation procedures. Patch documentation can contain critical information related to the base release, based on new information 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:

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."

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

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

A hyperlink appears like this.

Release Notes

Overview

Oracle Retail Advanced Inventory Planning (AIP) is a suite of modules designed to manage the supply chains of large retailers at the supplier, warehouse, store, and e-commerce levels. The system couples time-phased replenishment and allocation algorithms to produce an actionable receipt plan over time. This plan is based on demand forecasts, replenishment parameters, and inventory availability at the numerous supply points within the supply chain.

The user interacts with the AIP system through a number of modules:

- Store Replenishment Planning (SRP) Workbooks are used to maintain the replenishment characteristics for stores. These workbooks allow the user to analyze system output and perform what-if style analysis when replenishment parameters are changed.
- Warehouse Replenishment Planning (WRP) Workbooks are used to maintain the replenishment characteristics for warehouses. These workbooks allow the user to analyze system output and perform what-if style analysis when replenishment parameters are changed.
- Data Management is used to maintain the supply chain and network flow information. Sourcing links, lead times, and other data are managed in this module.
- Using the receipt plan, Order Management formally prepares those orders that need to be fulfilled. This preparation includes the assignment of an order number.

AIP Within the Oracle Retail Suite

AIP takes its place as one of several integrated applications within the Oracle Retail Suite. The suite allows a retailer to manage its supply chain from demand forecasting to the generation of orders, which can then be shared with collaborative planning partners.

Viewed at a high level, the process across the Oracle Retail Suites takes the following form:

1. Oracle Retail Demand Forecasting (RDF) provides a forecast of consumer demand. This data is made available to AIP.
2. The AIP batch run produces an actionable receipt plan using replenishment parameters maintained inside AIP. Hierarchy and inventory data are provided by a merchandising system such as Oracle Retail Merchandising System (RMS).
3. The receipt plan is then sent to the Order Management module within AIP, where those orders that need to be fulfilled are formally prepared for execution. This preparation includes the assignment of an order number.
4. Order Management then submits the appropriate orders to the merchandising system, where purchase orders and transfers are communicated to other systems. These orders are returned to AIP in subsequent batch runs as in-transit orders.
5. Sales forecasts and order plans can then be shared at the appropriate level with suppliers by using a collaborative planning, forecasting, and replenishment (CPFR) product, so that trading partners can prepare for the forthcoming orders.

At the core of the AIP batch process are five replenishment sub-processes. These sub-processes perform calculations on a set of loaded static and dynamic data, using replenishment parameters, to produce a replenishment receipt plan for all locations in the supply chain. This gives retailers the ability to project their demand at all levels of the supply chain and to share these projections with their suppliers whenever applicable.

A key design in producing an actionable receipt plan is the inclusion of known inventory constraints. To implement this design, AIP performs the five replenishment sub-processes across all locations in the following order:

1. Replenishment (in the fixed period) generates an unconstrained receipt plan during the constrained period.
2. Shortfall Reconciliation (in the fixed period) modifies the receipt plan, applying inventory shortages.
3. Substitution (in the fixed period) applies product substitutions where possible to address inventory shortages.
4. Stockless (in the fixed period) pushes any remaining excess product from stockless sources.
5. Replenishment (after the fixed period) generates an unconstrained receipt plan after the constrained period.

The resulting receipt plan is exported to the Order Management module, where order numbers are produced and the orders are released to external systems. Following formal order generation, these quantities are fed back into the system, and the plan is updated to account for these orders as expected receipts. This type of planning allows the retailer to identify potential supply chain issues before they arise, so that stock-outs and excess inventory problems can be prevented or reduced.

Note: The volume of the receipt plan produced by AIP is quite large, so user involvement should be kept to a minimum. However, in order to avoid persistent costly supply chain problems, super users must be able to review plans and change parameters quickly to see the effects of their changes. Oracle Retail recommends that these parameters be managed primarily by exceptions in the receipt plan. *Manage by exception* means that not every SKU or warehouse is reviewed or updated on a regular basis. Items with exceptions (alerts) should be reviewed and updated if necessary.

Note: AIP 13.0 supports English only. When integrated with Oracle Retail Merchandising System (RMS) 13.0, some hierarchy description values are partially truncated.

AIP Versions and Corresponding RPAS Versions

The following table provides a complete history of AIP since its first GA version. The table lists each version of AIP together with the version of the RPAS foundation to which it is tied. For more information on compatibility and integration with RPAS, please see the Compatibility and Hardware Requirements section of the *AIP Installation Guide*.

Date	Version Category	AIP Version	RPAS Version
May 14, 2007	Full release	12.0	12.0.4
June 6, 2007	Patch Update	12.0.1	12.0.4
August 29, 2007	Patch Update	12.0.2	12.0.5.3
January 28, 2008	Full Release	12.1	12.1.1.7
June 9, 2008	Full Release	13.0	12.1.2.21

Functional Enhancements

The table below identifies the key functional enhancements for AIP 13.0.

Functional Enhancements
Multi-Source Multi-source provides the user with the capability of specifying secondary or alternate sources to provide inventory when the primary source cannot meet demand. The primary source may have insufficient inventory to meet the need at the receiving warehouse or, due to lead time, the primary source may not be able to meet the required delivery date. Secondary sources are prioritized by the user in the preferred order in which they should be used to satisfy shortages. Multi-source gives businesses the opportunity to efficiently manage inventory by selecting the most cost-effective primary source, knowing that AIP will automatically look to secondary sources to satisfy shortages.
Supplier Purchase Quantity (SPQ) Several enhancements have been made to the Supplier Purchase Quantity (SPQ) (formerly known as Fixed Purchase Quantity, or FPQ) functionality. A supplier dimension has been added to the SPQ specifications, allowing multiple suppliers for the same SKUGroup. This functionality is also supported by the Multi-source enhancements. SPQ has been modified to prevent the setup of an SPQ for a supplier that directly supplies a store, thus allowing for proper distribution to warehouses. Additionally, the SPQ Analysis Worksheet has been redesigned to remove measure inconsistencies.

Technical Enhancements

The table below identifies the key technical enhancements for AIP 13.0.

Technical Enhancement
Dual RIB Compatibility AIP 13.0 has dual compatibility with Oracle Retail Integration Bus (RIB) versions 11.1 and 13.0.

Integration Enhancements

The table below identifies the key integration enhancements for AIP 13.0.

Integration Enhancement
Integration with RMS 13 AIP has been integrated with RMS 13 as part of this release.
Certification with RIB 13 AIP has been certified with RIB 13 as part of this release.
Certification with RETL 13 AIP has been certified with RETL 13 as part of this release.

Fixed Issues/Defects

The table below represents known issues that have been fixed during the development of this release of AIP. Oracle Retail recommends that AIP retailers familiarize themselves before they begin implementation.

Known Issue	Functional Impact
Direct profile exceptions were not included in the store release schedule calculation.	Direct (from vendor) profile exceptions entered in Data Management Online are now interfaced to Data Management Batch to be applied in the store release schedule calculation. Previously, only warehouse profile exceptions were applied.
Separate purchase orders could be assigned the same order number.	Order Management Online now ensures that all manually created purchase orders will have a distinct order number including scenarios in which orders are created simultaneously.
Fixed Purchase Quantity (FPQ) maintenance and execution issues.	Several enhancements have been made to the Supplier Purchase Quantity (formerly Fixed Purchase Quantity, or FPQ) functionality. Please refer to the Functional Enhancements section for additional details.

Known Issues/Defects

The table below represents known issues as of this release of AIP. Oracle Retail recommends that AIP retailers familiarize themselves before they begin implementation.

Known Issue	Functional Impact
Negative SPQ order commit quantity entry.	The SPQ Analysis Worksheet permits the entry of a negative number in the SPQ Order Commit Quantity field. A negative number is not a legitimate Order Commit Quantity for an SPQ. Providing the user enters a positive quantity, SPQ functionality will behave as designed. The entry of a negative number will result in the SPQ quantity being considered "exhausted" from the outset and therefore no inventory would be ordered from the specified vendor in the SPQ week.
Fixed-type SPQ inventory push to warehouse(s) and store(s).	In rare circumstances, the pushing of inventory to stores to exhaust a Fixed-type SPQ may fail. In situations where a vendor has a Fixed-type SPQ for a SKU and the vendor delivers to warehouses with one pack size and also delivers direct to stores with a smaller pack size; any remaining SPQ quantity above the demand which needs to be absorbed from the vendor will not be pushed to stores. Instead, it will remain unused at the vendor, thereby not observing the agreement by the retailer to order all of the SPQ quantity. Situations where the vendor only delivers to warehouses are not affected by this issue.
WRP Interactive Evaluation Workbook "N/A value" display.	The Lead Time Measure on the WRP Receipt Plan by SKU Pack Size Worksheet in the WRP Interactive Evaluation Workbook is displaying the value "-2" instead of displaying blank values. This is a read-only measure and is a display issue only. The "-2" value represents a non-ATP (Available to Plan) day, and the batch processes these days correctly.
WRP Interactive Evaluation Workbook lead time display.	The Lead Time Measure on the WRP Receipt Plan by SKU Group Worksheet in the WRP Interactive Evaluation Workbook is not displaying the lead times from secondary sources to their destination warehouse(s). There can be only one lead-time between a source and a warehouse. When a source is only used as a secondary source for one or more warehouses, the lead time from that source to a warehouse is not being displayed. However, if a source is a primary source for one or more warehouses and is also a secondary source for one or more warehouses, the lead time will be correctly displayed. This is a display issue only. All appropriate lead times are used in batch calculations.
Order Management Online order number assignment.	When creating manual purchase orders in Order Management Online, order numbers will not be assigned properly when the virtual date (VDATE) differs from the system date.

Previous Releases

For information on previous AIP release enhancements and additional information, refer to the release notes and documentation that accompany the previous release.