Oracle® Retail Advanced Inventory Planning

Release Notes
Release 13.0.1

August 2008

ORACLE

Oracle® Advanced Inventory Planning Release Notes, Release 13.0.1

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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 13.0.1 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.

> **Note:** AIP 13.0.1 introduces compatibility with the Sun Solaris 10 operating system. Therefore, AIP 13.0.1 will be separately packaged as a full installation release for new AIP clients using Sun Solaris 10, and as a patch release for existing AIP 13.0 clients using IBM AIX 5.3 and HP-UX 11.23 Itanium.
>
> **Note:** AIP Java/Oracle, AIP on Oracle, and AIP Online are often used interchangeably to refer to those parts of AIP that access the Oracle relational database. This includes the Data Management and Order Management GUI components and a host of UNIX shell scripts and PL/SQL modules.

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 13.0.1 supports English only. When integrated with Oracle Retail Merchandising System (RMS) 13.0.1, some hierarchy description values are partially truncated.

AIP Versions and Corresponding RPAS Versions

The following table provides a history of AIP since the 13.0 release. 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
June 9, 2008	Full Release	13.0	12.1.2.21
August 15, 2008	Patch Update (AIX, HP-UX)	13.0.1 Patch	13.0.1.2
August 22, 2008	Full Release (Solaris)	13.0.1	13.0.1.2

Technical Enhancements

The table below identifies the key technical enhancements for AIP 13.0.1.

Technical Enhancement
Oracle Configuration Manager Oracle Configuration Manager is an optional configuration data collector that provides continuous tracking of key Oracle and system configuration settings for machines on which it is installed. This tool collects configuration details for customer environments and uploads them to a repository that is viewable through the Software Configuration Manager Metalink Web site. The OCM collector is optionally installed as part of your application installation. Using Oracle Configuration Manager can reduce a retailer's support costs by providing extra configuration information that otherwise requires a phone call or e-mail correspondence. **Note:** Sensitive configuration information (such as passwords) is not included in Oracle Configuration Manager collection. The first OCM collector distribution that will be aware of the Oracle Retail applications is in Oracle development. For more information, please refer to the *AIP Installation Guide*.

Integration Enhancements

The table below identifies the key integration enhancements for AIP 13.0.1.

Integration Enhancement
Compatibility with RPAS 13.0.1.2 AIP 13.0.1 is compatible with RPAS 13.0.1.2.

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.

Fixed Issue	Functional Impact
Negative SPQ (Supplier Purchase Quantity) order commit quantity entry.	The SPQ Analysis Worksheet now ensures that only positive integers can be entered in the SPQ Order Commit Quantity field.
Fixed-type SPQ inventory push to warehouse(s) and store(s).	Previously, in situations where a vendor had a Fixed-type SPQ for a SKU and the vendor delivered to warehouses with one pack size and also delivered directly to stores with a smaller pack size, any remaining SPQ quantity above the demand which needed to be absorbed from the vendor would not be pushed to stores. Instead, it would remain unused at the vendor, thereby not observing the agreement by the retailer to order all of the SPQ quantity. The reconciliation process now searches for and utilizes any opportunities to push any pack size in the current SKU group to a store.
WRP Interactive Evaluation Workbook "N/A value" is displayed as "-2".	The Lead Time Measure on the WRP Receipt Plan by SKU Pack Size Worksheet in the WRP Interactive Evaluation Workbook now represents a null value by displaying nothing.
WRP Interactive Evaluation Workbook lead time display.	Previously, the Lead Time Measure on the WRP Receipt Plan by SKU Group Worksheet in the WRP Interactive Evaluation Workbook was not displaying the lead times from secondary sources to their destination warehouse(s). When a source was only used as a secondary source for one or more warehouses, the lead time from that source to a warehouse was not being displayed. The associated lead time is now displayed correctly.
Order Management Online order number assignment.	Previously, when creating manual purchase orders in AIP Oracle Order Management Online, order numbers were not assigned properly when the virtual date (VDATE) differed from the system date. The Order Management Online servlet logic now uses the virtual date for all calculations.

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	Mitigation
Database connection pool size default.	Under heavy concurrent user load, the Data Management Online and Order Management Online screens can experience database connection wait times.	Add the following line to the db.properties file created in the <INSTALL_DIR>/config directory by the AIP Oracle Application Installer: common.prop.poolsize=25
AIP Oracle performance.	Some AIP Oracle database tables can be partitioned or logically divided to achieve improved batch process performance.	In active Oracle Retail development.
AIP Oracle database interaction.	The AIP Oracle Java servlet code can be modified to provide enhanced logging and to prevent database cursors from remaining open longer than necessary.	In active Oracle Retail development.
Some RMS UPC item number types cannot be used with AIP.	The "UCC12 with Supplement" and "EAN/UCC-13 with Supplement" RMS item number types, which are 18 and 19 digits, respectively, cannot be used when interfacing RMS items to AIP.	Under consideration by Oracle Retail development, but not yet scheduled.
SRP Workbook Wizard.	In the SRP Evaluation and Interactive Evaluation wizards, when rolling up to any particular dimension, selecting positions, clicking Next and then canceling prior to workbook build, the user will encounter an error when next entering the wizard.	In active Oracle Retail development. Workaround: Logging out of the client and back in will allow a successful workbook build.

Known Issue	Functional Impact	Mitigation
After the promotional period, the promotional SKU continues to be ordered.	This issue applies to promotional substitutions where, during the promotional period, a promotional SKU is replenished instead of the normal SKU. To facilitate this functionality, various pieces of data including the sales forecasts are copied from the original SKU to the promotional SKU. However, the information is being copied to the promotional SKU for the entire planning horizon and not just the promotional period. Therefore, the promotional SKU is being ordered after the promotional period has ended.	Under consideration by Oracle Retail development, but not yet scheduled.
Repeated calls to "What If - Constrained" in the WRP Interactive Evaluation cause forecasted receipts to become 0.	Once the WRP Interactive workbook has been opened, the “What-if – constrained” functionality only produces correct results the first time. Subsequent “What-if Constrained” calculations yield incorrect results and the forecast (planned) receipts become zero.	In active Oracle Retail development.
Residual excess quantity not being calculated correctly in case of stockless scenario with inventory cap.	In stockless situations where an inventory cap is present, any inventory that cannot be pushed to stores because of the presence of the cap should be logged as a residual excess quantity.	Under consideration by Oracle Retail development, but not yet scheduled. It is recommended that inventory capping should not be applied in situations where the warehouse is stockless.
Workbook access level.	Accessing the Inventory Capping Management workbook at the local domain level does not provide visibility to all necessary SKUs and can produce an incorrect result.	Under consideration by Oracle Retail development, but not yet scheduled. Users should only access the Inventory Capping Management workbook at the global domain level.

Metalink Note 731804.1: Creating an AIP RPAS Domain with Customer Hierarchy Data

This white paper resolves the issue surrounding the creation of an AIP RPAS domain loaded with customer hierarchy data, using the AIP installation package with the included sample hierarchy data as a starting point.

Previous Releases

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