

**Oracle® Retail Advanced Inventory Planning**  
Release Notes  
Release 13.0.2

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# 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 13.0.2 documentation set:

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

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- 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

If you are installing the application for the first time, you install either a base release (for example, 13.0) or a later patch release (for example, 13.0.2). If you are installing a software version other than the base release, be sure to read the documentation for each patch release (since the base release) before you begin installation. Patch documentation can contain critical information related to the base release 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 (with the exception of the Data Model which is only available with the release packaged code):

[http://www.oracle.com/technology/documentation/oracle\\_retail.html](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.”

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

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

A hyperlink appears like this.

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# 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.

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**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.

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## 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.

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**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 13.0.2 supports English only. When integrated with Oracle Retail Merchandising System (RMS) 13.0.2, some hierarchy description values are partially truncated.

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## 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
October 31, 2008	Patch Update (AIX)	13.0.1.1	13.0.1.11
December 19, 2008	Patch Update (AIX)	13.0.2	13.0.2.1

## Functional Enhancements

The following sections describe the key functional enhancements for AIP 13.0.2.

### Historic SRP data

AIP users receive SRP (Store Replenishment Planning) alerts, mostly at the SKU/store level when a predefined threshold has been broken. Providing historical data for certain SRP measures allows AIP users to better understand the root cause of the alert. Historical data for the following measures will be retained for a configurable number of days. AIP can subsequently be configured to include these measures in the nightly workbook build.

- Store Available to Plan Receipt
- Store Detailed CRP
- Store Presentation Stock
- Store Promotional Presentation Stock
- Store Release Schedule
- Store Replenishment Method
- Store Safety Stock
- Store Source
- Store RDF Weekly Baseline Forecast

## SRP Alerts

Several new alerts have been added to AIP for improved inventory and supply chain management:

1. High Planned Order Alert

The modified calculation looks forward from today at the next receipt plan date where the release day is more than the number of days between today and this date. Effectively, this is the next order that has yet to be released, and therefore any action to resolve a potential issue can be addressed before this order would be released. For this order, the quantity of the order is compared to the future forecast and pack size and alerted when this order is higher than these values. This alert is configurable at the SKU/Store/Day level and can define the number of days in the horizon at which the alert looks.

2. High Repeated Dissipation (Markdown & Waste) Alert

This alert must trigger when a given number of stores have had markdown and/or waste over a given number of days and had markdown and/or waste yesterday. The criteria for alerting will be based on the number of stores and the value of loss as percent of sales, configurable at the SKU level.

To enable this Alert in SRP, SRP must have historical data of waste (Inventory Adjustment) and markdown sales quantity (Short Code Sales) which are new data feeds accepted by AIP.

3. High Dissipation Yesterday Alert

This alert must trigger when markdown and/or waste yesterday was greater than the percent of sales with more than a percent of ranged stores identified, or markdown and/or waste across all stores was greater than the percent threshold of sales. This alert is configurable at the SKU level, and will not trigger if the High Repeated Dissipation Alert has already triggered.

To enable this Alert in SRP, SRP must have historical data of waste (Inventory Adjustment) and markdown sales quantity (Short Code Sales) which are new data feeds accepted by AIP.

## Store Receipt To Availability Lead-Time

Receipt-to-Availability Lead-Time (RALT), or the delay between the receipt of inventory and the availability of inventory to meet demand, is a concept that was previously only available for warehouses destinations. RALT is now available for application to store destinations as well.

Prior to the 13.0.2 release, Store Receipts were always assumed to be available to meet demand on the same day. This is the equivalent of a RALT value of “0” (zero), indicating no delay between receipt and immediate availability to meet demand. However, inventory that arrives later in the day to a store may not be available to meet some or all of the demand for that day. In these situations, RALT can be set to “1” (one day) and Replenishment will acknowledge that any demand on the current day must be met by a previous receipt and not the receipt on the day in question.

Measures have been provided to set RALT at Global, Default, and Exception levels. These measures can be loaded from a custom interface, or they can be added to a Measure Analysis Workbook for manual maintenance. Only values of zero and one are permitted. If the values are not explicitly set, the value defaults to zero.

## Singles Changes

In previous releases, the term “singles-ordering” referred to the ability of a store that normally orders cases of a pack-size larger than one to place orders for less than a single case.

For example, if a store’s normal ordering pack-size is 6., the store would normally order in multiples of 6 eaches. However, if the warehouse and store were configured correctly, then the store rounding method could be set to enable the store to order a number of eaches between 1 and 5 for instances where the need was for less than 6. If the need was greater than 6, the store would still be forced to order in multiples of 6.

As of the current release, the approach to singles-ordering has been simplified. Now, any store that desires to order in eaches rather than multiples of a larger pack-size should simply have its preferred ordering pack-size set to “1” in Data Management Online (DM Online). The store can then order as many or as few eaches as its replenishment needs dictate. There is no need to set a given SKU/Store to be singles-enabled, so this setting has been removed from DM Online. Furthermore, the singles-related rounding methods have also been removed from Store Replenishment Planning (SRP).

All demand created by stores ordering a pack-size of one is met at the warehouse by the inventory of pack-size one. In some instances, a retailer may choose to supply the warehouse with inventory of a larger pack-size and then break this inventory down to meet the demand for pack-size one created by the stores. In these situations when Inventory Tracking Level is set to “Packs”, it is necessary to set the Warehouse Break-packs flag (renamed from Singles-enabled Warehouse flag). Setting this flag will cause Reconciliation to “break” the inventory of the larger packs to create available inventory of pack-size one. When the Inventory Tracking Level is set to “Eaches”, the Warehouse Break-packs flag is redundant, because all inventory at all locations is automatically stored against pack-size one to facilitate SKU-level planning.

## DM Automation Changes

The system now provides a new level of control of the automatic creation of Warehouse Profiles and automatic assignment of new SKUs to warehouse Profiles. The automatic creation of warehouse Profiles can be enabled or completely disabled. When enabled, the warehouse Profiles are created when a new Supplier is introduced. The automatic assignment of new SKUs will be done according to a setting which indicates Class, Supplier, or disabled. The user must assign the Warehouse Profile to a particular Class in DM Online before new SKUs will be automatically assigned for that Class. Note that the creation of Direct Supplier Profiles is not impacted by this change.

## Technical Enhancements

The following sections describe the key technical enhancements for AIP 13.0.2.

### Purchase Order / Transfer processing configuration

Additional configuration capabilities have been added to AIP to control the order in which into-store purchase orders, into-store transfers, into-warehouse purchase orders, and into-warehouse transfers are loaded to and released from AIP-Oracle. This modification allows clients the flexibility to prioritize this processing to best fit their needs.

## 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
Under heavy concurrent user load, the Data Management Online and Order Management Online screens previously could experience database connection wait times. A modification to a properties file has resolved the issue.
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. However, at the current time, the quantity is not correctly being logged.

## 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
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.
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 for the promotional period. Therefore, the promotional SKU is being ordered after the promotional period has ended.  It is recommended that the promotional substitution functionality not be used at this time.	Under consideration by Oracle Retail development, but not yet scheduled.
Workbook access level.	When selecting new workbooks at the local domain level, the Inventory Capping Management workbook is available for selection.	It is recommended that clients set user security permissions so that the Inventory Capping workbook can only be accessed at the Global Domain level.  Under consideration by Oracle Retail development, but not yet scheduled.

### 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.