

Oracle® Retail Advanced Inventory Planning
Data Management Online User Guide
Release 13.1.1

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Preface

The Oracle Retail Advanced Inventory Planning Data Management Online User Guide describes the application's user interface and how to navigate through it.

Audience

This document is intended for the users and administrators of Oracle Retail Advanced Inventory Planning. This may include merchandisers, buyers, and business analysts.

Related Documents

For more information, see the following documents in the Oracle Retail Advanced Inventory Planning Release 13.1.1 documentation set:

- *Oracle Retail Advanced Inventory Planning Release Notes*
- *Oracle Retail Advanced Inventory Planning Patch Installation Guide*
- *Oracle Retail Advanced Inventory Planning Data Management Online - Online Help*
- *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 Implementation Guide*
- *Oracle Retail Advanced Inventory Planning Operations Guide*
- *Oracle Retail Advanced Inventory Planning Data Model Volume 1 Oracle Database Data Model*
- *Oracle Retail Advanced Inventory Planning Data Model Volume 2 Measure Reference Guide*

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

<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

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

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.

Welcome to Oracle Retail Advanced Inventory Planning

Oracle Retail Advanced Inventory Planning (AIP) is a suite of products designed to manage the supply chain needs of retailers, from interaction with their suppliers through various layers of warehouses down to individual stores and e-commerce sites. Oracle Retail Advanced Inventory Planning couples time-phased replenishment and allocation algorithms to produce an actionable receipt plan over time, based on demand forecasts, replenishment parameters, and inventory availability at the numerous points within the supply chain.

Oracle Retail Advanced Inventory Planning provides the tactical inventory plan needed to run the business. Its purpose is to optimally forecast consumer demand, source supply, and fulfill demand in a time-phased manner. Because of Oracle Retail Advanced Inventory Planning, the supply chain is aligned into a virtual enterprise, and the retailer gains visibility across the supply chain to demand, supply and any constraints.

Oracle Retail Advanced Inventory Planning is composed of two parts:

- Oracle Retail Data Management online (DMo)
- Oracle Retail Order Management (OM)

Using AIP

Getting Started

How you access AIP depends on how the application is set up at your location. Contact your system administrator for instructions. After starting the application, you are prompted to log in. Your system administrator assigns a user name and a temporary password. You will need to change the password after you log on the first time. Additionally, your password periodically expires, in a period of time as determined by your system administrator.

The following rules apply when you change your password:

- Passwords must be a minimum of six (6) characters and maximum of 128.
- Passwords must contain at least five different characters.
- Passwords must not be a simple.
 - Cannot include sequences such as ABCDE or ABCXYZ.
 - Cannot contain more than four consecutive characters.
- Passwords cannot be based on your user name or your full name.
- Passwords cannot be based on a previous password.
- Passwords cannot be based on a dictionary entry.

Logging on to Oracle Retail Advanced Inventory Planning (AIP)

1. On the Login window, enter your user ID in the User Name field.
2. In the Password field, enter your password.
3. Click **Log In**.
4. In the Applications area, click AIP Online. The User Console is displayed.

Note: The User Console may be displayed when you log in. If this is the case, proceed to the next step.

5. Select the application you want to use.
6. Click **Start**. The application opens in a new window.

Changing Your Password

7. Log on to Oracle Retail Advanced Inventory Planning (AIP).
8. On the User Console, click **Applications**.
9. Click **Change Password**.
10. In the Current Password field, enter the password you used to log in to the applications.
11. In the New Password field, enter the password you want to use in the future.
12. In the Retype password field, enter the password you entered in the New Password field.
13. Click **Change Password**.

Note: You can click the "Return to front page without changing password" link to cancel your changes.

Exiting AIP

14. Click **Exit**. You are returned to the User Console.

Note: The Exit button is located on the standard button bar in the AIP workspace.

15. Click **Log Out**.

The AIP Workspace

After logging into AIP, you have access to the application window. The primary elements in the application window appear in the image below:

The screenshot shows the 'Data Management Online - Warehouse - Core Data - Delivery Groups - Select' application window. The title bar (A) is at the top. Below it is the menu bar (B) with options like Warehouse, Store, General, etc. The main workspace contains primary tabs (C) such as Demand Group Maintenance, Scheduling Location Maintenance, Ranging, Delivery Groups, etc. The Delivery Groups tab is selected, showing a form for 'Selected Delivery Group' (V51650011 - Test Setup1). The form includes fields for Delivery Group Type, Tier, Effective Date, Scheduling Location, Order Source, Demand Group, and Delivery Group. There are also buttons for Create, Edit, Delete, Search, Display, Clear Criteria, Clear Results, Clear All, Apply, Save, Refresh, Help, and Exit (E). A table at the bottom lists delivery groups with columns for Delivery Group, Scheduling Location, Order Source, and Demand Group.

Delivery Group	Scheduling Location	Order Source	Demand Group
V1660011 - Delivery Group Test	W109001 - Minneapolis1	V5165 - FRITO-LAY, INC.	
V51650011 - Test Setup1	W109002 - Minneapolis2		

- **A – Title Bar**
Located at the top of the application window. The title bar displays the product name and the area you are currently working in. The three buttons at the far right on the title bar allow you to minimize, restore, maximize, and close the application window.
- **B – Menu Bar**
Located below the title bar. The menu bar provides access to different areas of the application.
- **C – Primary Tabs**
Located at the top of the workspace. The primary tabs give you access to the functional areas available for the selections you made from the menu.

- D – Secondary Tabs
Located in the workspace, beneath the primary tabs. The secondary tabs give you access to the functional area within each primary tab, if they exist for a specific tab.
- E – Standard Buttons
Located at the left of the workspace. The standard buttons are enabled based on the work you have done or the selections you make in the workspace.

Navigating AIP

The basic method for entering data in a text field is to type the text in the field. Some fields are restricted, however, as to the type of data that may be entered. The options for entering or selecting data depend on the type of data that may be required or permitted in the field. For example, some fields permit only numeric data, while others permit only alphabetic or alphanumeric data. Some fields require a date to be entered in a specific format. Some fields permit only one value, while others permit multiple values.

Calendars, drop-down lists and lists of value provide you with access to preformatted, predefined values. Instructions for using these tools are provided below.

Using a Calendar Button

To look up the date, you can access a date picker window.



Date Picker Window

Select a Date

1. Click the calendar button next to a date field. The calendar window opens.

Note: The calendar button appears as a drop down button to the right of the date field.

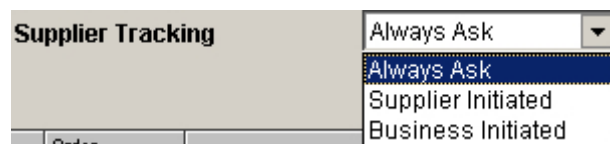
2. Select the desired date:
 - To select a year, press the left or right arrows next to the year field.
 - To select a month, click on the appropriate month abbreviation.
 - To select a day of the month, click the day on the calendar.
3. Click **OK**. The date field is automatically filled in when you select the day of the month.

Move the Date

You can move the selected date forward or backward.

Using a Drop-down List

Some fields are restricted to a predefined list of values. You access a drop-down list from which you can pick the desired value.



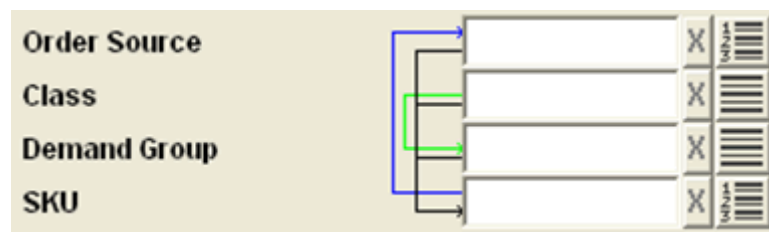
Drop-down List

4. Click on the drop-down  button next to a field. A list of predefined values appears.
5. If necessary, scroll through the list until the appropriate value appears.
6. Select the value. The field is automatically filled in with the selected value.

Field-Level Filtering in AIP

Some fields are filtered by the selections you have made in previous field. These fields are indicated by arrows pointing to them from other fields.

Note: Any fields that are required when searching are indicated with an asterisk (*).



Example of Field Level Filters

In the example

Field Name	Results in Limits to	Indicated By
Order Source, Class, and Demand Group	SKU	Black arrow
Class	Demand Group	Green arrow
SKU	Order Source	Blue arrow

Note: The colors indicated are specific to this example. The arrows in the window you are working in may be colored differently and serve only to help you distinguish the different lines.

Clear a Selection

After you make a selection, the clear LOV  button is enabled. If two fields filter each other as part of a field-level filter, you must clear your selections before you can make additional selections.

To clear the field, click the clear LOV  button.



Locked Filter Field

Sorting Rules

When certain elements are selected, related fields are filtered to only display data corresponding with the selected element. The following sections detail the impact of selection on these related fields.

Demand Group

When Demand Group is selected, the following field is filtered:

- SKU – Filtered to only display SKUs having a pack size in the selected demand group.

Profile

When Profile is selected, the following field is filtered:

- Class – Filtered to only display classes containing a SKU assigned to the selected profile.

SKU

When SKU is selected, the following fields are filtered:

- Demand Group – Filtered to only display demand groups containing a pack size of the selected SKU.
- Order Source – Filtered to only display suppliers that supply a pack size of the selected SKU, and warehouses that are ranged for a pack size of the selected SKU.

Class

When Class is selected, the following fields are filtered:

- Demand Group – Filtered to only display demand groups containing a SKU belonging to the selected class.
- SKU – Filtered to only display SKUs belonging to the selected class.

Supplier

When Supplier is selected, the following fields are filtered:

- Demand Group – Filtered to only display demand groups containing a SKU pack size that is supplied by the selected supplier.
- SKU – Filtered to only display SKUs having a pack size supplied by the selected supplier.
- Class – Filtered to only display classes containing a SKU that has a pack size supplied by the selected supplier.

Order Source

When Order Source is selected, the following field is filtered:

- SKU – If the selected order source is a supplier, SKU is filtered to only display SKUs having a pack size supplied by the supplier. If the selected order source is a warehouse, SKU is filtered to only display SKUs having a pack size ranged to the warehouse.

Store Format

When Store Format is selected, the following field is filtered:

- Store – Filtered to only display stores of the selected store format.

Warehouse

When Warehouse is selected, the following field is filtered:

- SKU – Filtered to only display SKUs that are ranged to the selected warehouse.

List of Values (LOV) Buttons

Some fields need to filter a large amount of information. To help you select the information, there are two types of LOV buttons:

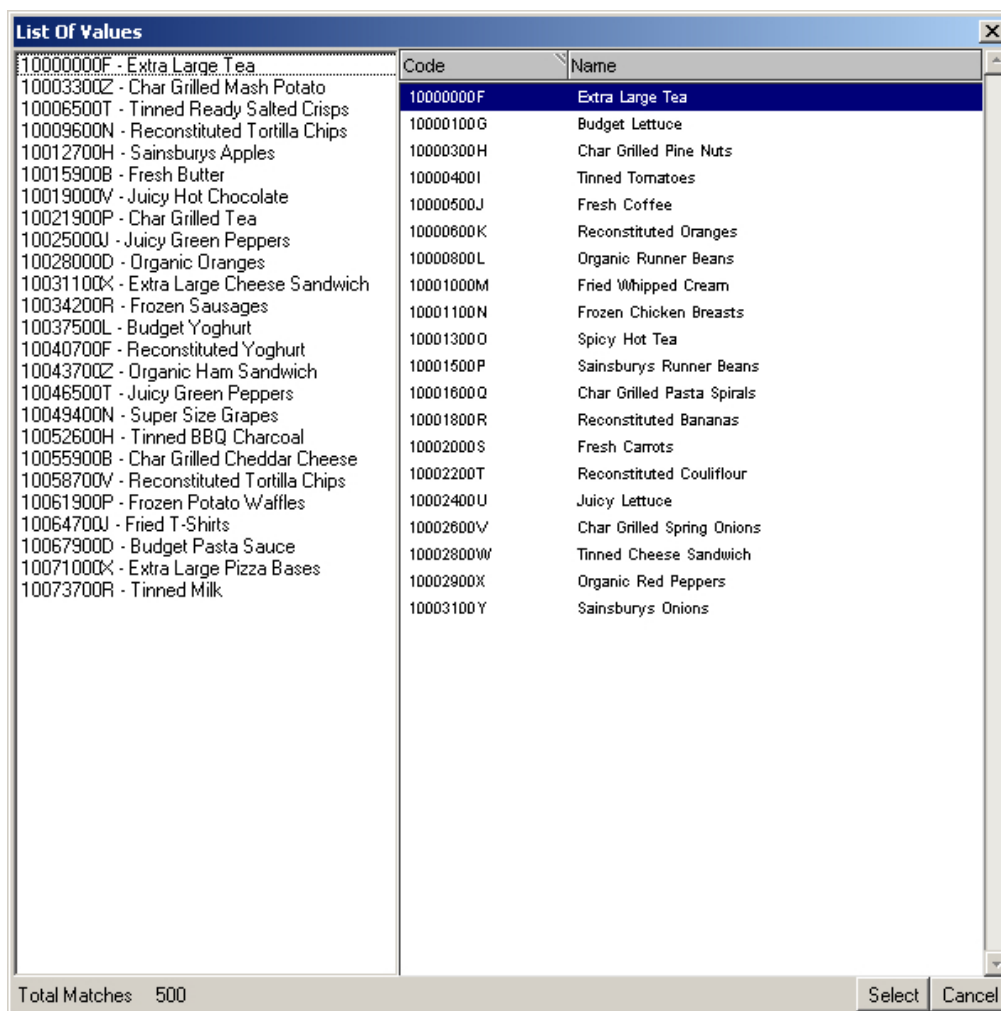
- **LOV  buttons:** Allow you to pick from a list of valid data that can be used in the field. A LOV button only allows you to make one selection.
- **Multi-select LOV  buttons:** For fields that permit multiple values, you can access a list of value window in multi-select view. The box contains two blocks. One block contains the predefined values that are available to you. The second block contains the values that have already been assigned to the field, if any. You have the option of:
 1. Removing assigned values, which places them back in the available list.
 2. Adding values, which places them in the selected list.

When a multi-select LOV button has multiple values selected, the first value that was selected is displayed followed by and ellipse.

The list of values window displays the first set of 20 values and a paging mechanism. To view additional sets of information, select from the list on the left side.

Using a LOV Button

1. Click the LOV  button next to a text field. The list of values window opens. The total number of values appears on the footer of the window.



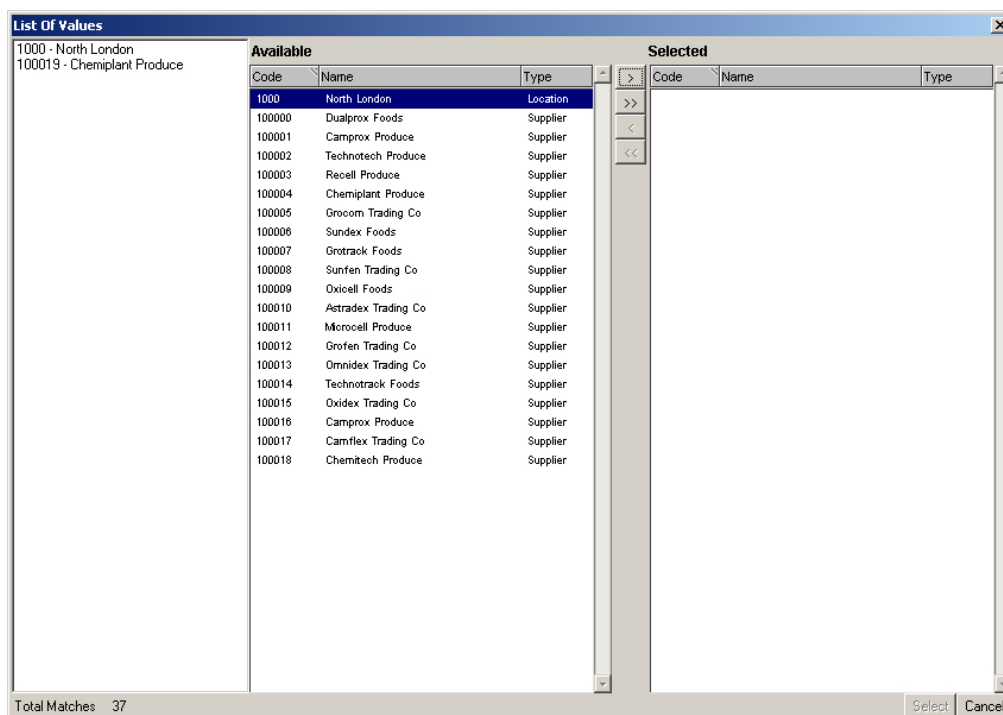
List of Values Window

Note: You can enter information into the field before you click the LOV  button. A partial list of values is return that matches the information you entered. If you enter a complete, valid value and press Enter, the information is displayed without opening the list of values window.

2. Select a value. Page as necessary to find your value.
3. Click **Select**. The field is automatically filled in with the selected value.

Using a Multi-Select LOV Button

1. Click the multi-select LOV  button next to a text field. The list of values window opens. The total number of values appears on the footer of the window.



Code	Name	Type
1000	North London	Location
100000	Dualprox Foods	Supplier
100001	Camprox Produce	Supplier
100002	Technotech Produce	Supplier
100003	Recell Produce	Supplier
100004	Chemiplant Produce	Supplier
100005	Grocom Trading Co	Supplier
100006	Sundex Foods	Supplier
100007	Grotrack Foods	Supplier
100008	Sunfen Trading Co	Supplier
100009	Oxicell Foods	Supplier
100010	Astradex Trading Co	Supplier
100011	Microcell Produce	Supplier
100012	Grofen Trading Co	Supplier
100013	Omniindex Trading Co	Supplier
100014	Technotrack Foods	Supplier
100015	Oxidex Trading Co	Supplier
100016	Camprox Produce	Supplier
100017	Camflex Trading Co	Supplier
100018	Chemitech Produce	Supplier

List of Values window - multi-select view

Note: You can enter information into the field before you click the multi-select LOV  button. A partial list of values is return that matches the information you entered. If you enter a complete, valid value and press Enter, the information is displayed without opening the list of values window.

2. Select the appropriate values:
 - Select one or more values in the selected values box. Page as necessary to find your value.
 - Click the move right  button. The values are displayed in the selected values box.

Note: To move all values displayed in the available area, click the move all right  button.

3. Remove unneeded values:
 - Select one or more values in the selected values box.
 - Click the move left  button. The values are removed from the selected values box

Note: To move all values displayed in the selected area, click the move all left  button.

4. Click **Select**. The field is automatically filled in with the selected values.

Transfer Boxes

For fields that permit multiple values, you can use a transfer box. The box contains two blocks. One block contains the predefined values that are available to you. The second block contains the values that have already been assigned to the field, if any. You have the option of

1. Removing assigned values, which places them in the available list.
2. Adding values, which places them in the selected list.

Using a Transfer Box

1. Select the appropriate values:
 - a. Select one or more values in the available values box.
 - b. Click the move right  button. The values are moved to the selected values box.

Note: To move all displayed values, click the move all right  button.

2. Remove Unneeded Values:
 - a. Select one or more values in the selected values box.
 - b. Click the move left  button. The values are returned to the available values list.

Note: To move all displayed values, click the move all left  button.

Moving Top Level Folders and Folder Components

- Select the top level folder to move the folder and all components contained within the folder.
- Select the individual component of the folder to move the folder component without including the entire folder.

Sorting a Table

In a table you can sort the results:

- To sort the list, click any column heading. Hatch marks indicates the column that is currently sorted, as well as the order: ascending or descending.
- To reverse the current sort order, click the same column heading again.
- To sort on multiple columns, where allowed, click the column heading to select the sort order and then right-click the column heading. The column heading turns red to indicate the column is locked. Repeat this process for other columns displayed on screen.

Alert Status	Alert	Priority	Alert Type	Alert Date
Closed	A source split was assigned to a single source when more than one source exists for: Effective Date 11-APR-06, Source 100139, Demand Group 100556 , 2		New Source Split	04/12/2006

Example of Table Data Sorted by Multiple Columns - Alert Status and Priority

Paging through Records

On some tabs, like the Alerts tab where numerous records may be displayed, paging controls appear at the bottom of the tab. This feature allows you to page through the records as needed. The total number of pages appears to the left of the paging controls.



Example of Paging Controls

Using the Paging Controls

- To page forward, click the Next  button. The next page of records appears.
- To page backward, click the Previous  button. The previous page of records appears.
- To view the first page of records, click the First Page  button. The first page of records appears.
- To view the last page of records, click the Last Page  button. The last page of records appears.

Using the Online Help

Welcome to the online help for Oracle Retail Advanced Inventory Planning.

About the Online Help

The online help system uses JavaScript for some of its functionality. Make sure you have enabled JavaScript for your Web browser. Refer to the online help in your Web browser for instructions on enabling JavaScript.

Introduction

This help site provides step-by-step procedures as well as other information about using Oracle Retail Advanced Inventory Planning. We have implemented some tools to assist your navigation of this help site. This page explains these tools.

Formatting Conventions

This section provides information about the documentation conventions used in the online help.

Note: Notes are displayed using this convention. Notes contain additional information about the process or procedure that you are performing.

Navigate: The navigation sections of a procedure provides information about how to access the window that is the starting point of a procedure.

Navigating the Online Help

This help site provides several ways for you to navigate to your topic.

Using the Table of Contents

The table of contents is the most common way that you will navigate to your topic.

1. Select the **Contents** tab to display the table of contents on the left side of your screen.
2. Double-click on a book to expand it and view the topics.
3. Select a topic from the table of contents to view it.

Using the Search Feature

Use the search feature to explore the contents of your topics and find matches to queries that you define. There are some basic rules for making queries in full-text searches.

- You can type your search in uppercase or lowercase characters. Searches are not case sensitive.
- You can search for any combination of letters (a-z) and numbers (0-9).
- Punctuation marks such as the period, colon, semicolon, comma, and hyphen are ignored during a search.
- Group the elements of your search using double quotes or parentheses.
- You cannot search for quotation marks.

Follow this procedure to use the search feature.

1. Select the **Search** tab to display the search feature on the left side of your screen.
2. In the Search field, enter the word or words that you want to find.
3. Press the Enter key. Topics that match your search criteria display in the left pane.
4. Select a topic to view it

Data Management Online

Introduction to Oracle Retail Data Management Online

The Oracle Retail Data Management (DM) online component of Oracle Retail Advanced Inventory Planning allows you to define the supply chain your organization uses. To use DM online, the following hierarchy information must be loaded into Oracle Retail Advanced Inventory Planning from your external systems:

- Suppliers
- Warehouses
- Stores
- SKU-pack sizes
- Supplier/SKU-pack sizes
- On sale/off sale dates

After this information is added you can begin to create your supply chain. This process has many dependencies, in which one area must be set up before you can proceed to the next area.

General

Alerts

View Alerts

The Alerts tab allows you to view exception information that is produced by the overnight batch process. These alerts warn you about a variety of situations which may require your attention, including information about the data you have entered or failed to enter in Oracle Retail Data Management online (DMo).

Each morning, the alerts produced by the latest overnight batch run are loaded into DM online.

Alerts can have one of the following statuses:

- **Open:** The alert has not been worked on and is awaiting resolution.
- **In Progress:** Someone is working on the alert.
- **Closed:** The alert has been worked on.

Search for Alerts

Navigate: Log into Data Management. From the General menu, select Alerts. The Alerts tab opens.

Alerts Tab

1. Select the criteria you want to search for:
 - In the Alert Day field, select the first date you want to search for.
 - In the To field, select the last date you want to search for.
 - In the Priority field, select the priority of the alert you are searching for.
 - In the Alert Type field, enter the ID of the ID type you are searching for.
 - In the Alert Status field, select the status of the alert you are searching for.
2. Click **Search**.

Change the Status of a Single Alert

Navigate: Log into Data Management. From the General menu, select Alerts. The Alerts tab opens.

1. Search for alerts.
2. In the Alert Status field, select the status you want the alerts set to.
3. Click **Save**. You are prompted to confirm your decision.
4. Click **OK**.

Change the Status of All Displayed Alerts

Navigate: Log into Data Management. From the General menu, select Alerts. The Alerts tab opens.

1. Search for alerts.
2. In the Set All Status To field, select the status you want the alerts set to.
3. Click **Update**.
4. Click **Save**. You are prompted to confirm your decision.
5. Click **OK**.

Export an Alert List

Navigate: Log into Data Management. From the General menu, select Alerts. The Alerts tab opens.

1. Search for alerts. All alerts displayed will be exported when complete.
2. Click **Export**.
3. Select the format to save the file.
4. Click **OK**.
5. Select the location to save the file to.
6. Click **Save**. You are prompted to confirm your decision.
7. Click **OK**.

Core Data

Maintain Planning Horizons

The Planning Horizon Maintenance tab allows you to define the planning horizons for the system. Planning horizons define the number of days in the future that replenishment plans are created for. Planning horizon defaults are defined at the class level and are used by Oracle Retail Replenishment Planning.

You can create the following exceptions to the planning horizon:

- Exceptions to planning horizons are defined at the SKU level.

Search for a Planning Horizon for a Class

Navigate: Log into Data Management online. From the General menu, select Core Data. Select the Planning Horizon Maintenance tab.

Planning Horizon Maintenance Tab

1. Select the Default Horizon radio button.
2. In the Class field, enter a class ID, or click the LOV  button and select a class.
3. Click **Display**. The current horizon for the class displays in the Current Horizon field.

Create a Planning Horizon for a Class

Navigate: Log into Data Management online. From the General menu, select Core Data. Select the Planning Horizon Maintenance tab.

1. Search for a planning horizon for a class.
2. In the New Horizon field, enter the number of days that are used for the planning horizon for the class.
3. Click **Save**. You are prompted to confirm your decision.
4. Click **OK**.

Delete a Planning Horizon for a Class

Navigate: Log into Data Management online. From the General menu, select Core Data. Select the Planning Horizon Maintenance tab.

1. Search for a planning horizon for a class.
2. Click **Delete**. You are prompted to confirm your decision.
3. Click **OK**.

Maintain Replenishment Planning Exceptions

Navigate: Log into Data Management online. From the General menu, select Core Data. Select the Planning Horizon Maintenance tab.

1. In the Exception Level Data area, select Replenishment Planning Exception.
2. In the SKU field, enter a SKU ID, or click the LOV  button and select a SKU.
3. Click **Display**.

Note: The color of the number in the Current Horizon field indicates whether the SKU currently uses the planning horizon of the class (black) or an exception has been created for the SKU (red).

- To create an exception
 - a. In the New Horizon field, enter the number of days that are used for the planning horizon for the SKU.
 - b. Click **Save**. You are prompted to confirm your decision.
 - c. Click **OK**.
- To delete an exception
 - a. Click **Delete**. You are prompted to confirm your decision.
 - b. Click **OK**. The exception is deleted and the planning horizon displays the current default value.

View a Store Ordering or Warehouse Ordering Schedule

The Warehouse and Store Ordering Schedule tab allows you to view the scheduling information for stores and warehouses.

Warehouse and store ordering schedules are calculated by the data you enter into other areas of AIP and therefore cannot be edited from the WH & Store Ordering Schedules tab. The schedule indicates whether the store or warehouse can receive deliveries. A lead time on a particular date indicates the number of days prior to delivery that orders will be placed.

View a Store Ordering Schedule

Navigate: Log into Data Management Online. From the General menu, select Core Data. Select the WH & Store Ordering Schedules primary tab and the Store secondary tab.

Data Management Online - General - Core Data - WH & Store Ordering Schedules

Warehouse Store General

Planning Horizon Maintenance | WH & Store Ordering Schedules

Store | Warehouse from Source Schedule

Effective Date: 05/09/2008

* Store: S1000000001 - Minneapolis

* Class: None

* SKU: 100117142 - AIP CARTRIDGE,INK,BL

Default Store Order Cycle Lead Time

Profile Default Release Exception

SKU Exception

Store Profile Exception

SKU / Store Exception

Release Exception

Store Schedule

Corporate Non-Receipt Day

Corporate Non-Release Day

Corporate Non-Release Day Exception

Resultant Schedule

May	S	S	M	T	W	T	F	S	S	M	T	W	May
9	10	11	12	13	14	15	16	17	18	19	20	21	22
			15							15			
Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
			15							15			

WH & Store Ordering Schedules - Store Tab

1. In the Store field, enter the store ID, or click the LOV  button and select a store.
2. In the Class field, enter the class ID, or click the LOV  button and select the class.
3. In the SKU field, enter the SKU ID, or click the LOV  button and select a SKU.
4. Click **Search**. Information pertaining to the selected store and SKU is displayed on the calendar.

View a Warehouse Schedule

Navigate: Log into Data Management Online. From the General menu, select Core Data. Select the WH & Store Ordering Schedules primary tab and the Warehouse from Source Schedule secondary tab.

WH & Store Ordering Schedules - Warehouse from Source Schedule Tab

1. In the Warehouse field, enter the warehouse ID, or click the LOV  button and select a warehouse.
2. In the Order Source field, enter the order source ID, or click the LOV  button and select the order source.
3. In the Class field, enter the class ID, or click the LOV  button and select the class.
4. In the Demand Group field, enter the demand group ID, or click the LOV  button and select a demand group.
5. Click **Search**. Information pertaining to the selected warehouse, source, and demand group is displayed on the calendar.

Note: Warehouse schedules are only produced for a demand group when the Location Orderable Unit has a status of Profile Ranged or Exception Ranged at the selected warehouse.

Profiles

Create a Profile

A profile is a collection of SKUs. The profiles describe the ordering cycle that gets an item a store. SKUs are initially assigned to a profile by batch. They are grouped by class or vendor. A SKU can belong to a warehouse profile and/or a supplier profile.

- **Warehouse:** The SKUs in the profile can be supplied to the store by a warehouse. Multiple warehouses may be assigned to a warehouse profile. All pack sizes for a SKU are automatically ranged to the warehouses in the profile. Ranging exceptions for a particular SKU-pack must be created manually.
- **Supplier:** The SKUs in the profile can be supplied directly to the store by the selected supplier.

You can assign SKUs to both warehouse and supplier profiles. A SKU may exist in multiple supplier profiles, but only in one warehouse profile on a particular date. Each profile must be assigned an order cycle. You must create network and planning groups before you can associate a profile to a network group.

Create a Profile

Navigate: Log into Data Management. From the General menu, select Profiles. On the Profile Maintenance primary tab, select the Profile Selection secondary tab.

Data Management Online - General - Profiles - Profile Maintenance

Warehouse Store General

Create Edit Delete Search Display Clear Criteria Clear Results Clear All Apply Save Refresh Help Exit

Class to Profile Assignment Planning Group Maintenance Profile Maintenance Profile Exceptions

Selected Profile 13 - Redex Foods Profile 3 [13] Profile Association Direct Supplier

Profile Selection Edit Attributes

Order Source V100003 - Redex Foods

Class None

SKU None

Supply Profile None

Get To Working Supply Profile

Supply Profile

11 - Redex Foods Profile 1 [11]
12 - Redex Foods Profile 2 [12]
13 - Redex Foods Profile 3 [13]
14 - Redex Foods Profile 4 [14]

Profile Selection tab

1. Click **Create**. The Create Supply Profile window opens.

Create Supply Profile

Profile Code 61

* Profile Name

Profile Association Warehouse

* Store Order Cycle None

Direct Supplier None

Save Cancel

Create Supply Profile Window

2. In the Profile Name field, enter a profile name.
3. In the Profile Association field, select the source type that the profile is associated with.

4. In the Store Order Cycle field, enter the store order cycle ID, or click the LOV  button and select a store order cycle.
5. In the Direct Supplier field, enter the direct supplier ID, or click the LOV  button and select a direct supplier.

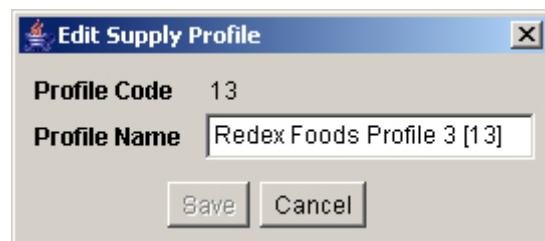
Note: The Direct Supplier field is available only if the profile association is direct supplied.

6. Click **Save**. You are prompted to confirm your decision.
7. Click **OK**.
8. Select the Edit Attributes tab.
9. Define the attributes of the profile.
 - Set a profile store order cycle
 - Assign SKUs to a profile
 - Maintain profile warehouse assignments
 - Assign network groups to a warehouse in a profile

Edit the Profile Name

Navigate: Log into Data Management. From the General menu, select Profiles. On the Profile maintenance primary tab, select the Profile Selection secondary tab.

1. Set a profile as the working profile.
2. Click **Edit**. The Edit Supply Profile window opens.



Edit Supply Profile Window

3. In the Profile Name field, enter the profile name.
4. Click **Save**. The window closes and the new name appears in the header.

Profile maintenance

Edit a Profile

To edit a profile, you must select a profile in the Profile Selection window, and indicate that it is the working profile. You are then able to edit the profile attributes in the Edit Attributes window. Among the profile attributes you can edit are:

- **Store order cycle for a profile:** Allows you to select the store order cycle that will be used when ordering the SKUs which are assigned to the working profile.
- **SKU assignments:** Allows you to add SKUs to the grouping of SKUs assigned to the working profile. All SKUs in a profile should have similar ordering cycles. The store order cycle for the profile, and all profile exceptions will be applied to all SKUs assigned to the profile.

A SKU may exist in a single warehouse profile and at the same time it may exist in one or more direct profiles. If a SKU is being placed in a warehouse profile, it must

be removed from an existing warehouse profile, if it is in one for that day. Placing a SKU in a warehouse profile does not remove it from any existing direct profiles.

When SKUs are added to a warehouse profile, all pack-sizes for each SKU are profile-ranged to all warehouses assigned to the working profile.

- **Profile warehouse assignments:** Allows you to identify the warehouses that can supply the SKUs in the profile to a store. When warehouses are added to a warehouse profile, all pack-sizes for each SKU are profile-ranged to all warehouses assigned to the working profile. A warehouse that is the current home warehouse for any store in the working profile may not be un-assigned.
- **Network groups:** Allows you to associate each of the profile's warehouses with a single network group. You may set a new network group assignment or change an existing assignment.

Profile/Store Order Cycle

The store order cycle displayed is the calculated order cycle day and its associated lead time for fourteen (14) days starting on the effective date. The order cycle day is calculated with a start date of January 2nd, 2000 for all cycles. All 14 and 28 day cycles are calculated against this date. For 7 day cycles, there is nothing to calculate since they run from Sunday to Saturday and repeat the same pattern through time.

Set a Profile to a Working Profile

Navigate: Log into Data Management. From the General menu, select Profiles. On the Profile Maintenance primary tab, select the Profile Selection secondary tab.

Data Management Online - General - Profiles - Profile Maintenance

Warehouse Store General

Create Class to Profile Assignment Planning Group Maintenance Profile Maintenance Profile Exceptions

Edit Selected Profile 13 - Redex Foods Profile 3 [13] Profile Association Direct Supplier

Delete

Search Profile Selection Edit Attributes

Display

Clear Criteria

Clear Results

Clear All

Apply

Save

Refresh

Help

Exit

Order Source V100003 - Redex Foods

Class None

SKU None

Supply Profile None

Set To Working Supply Profile

Supply Profile

11 - Redex Foods Profile 1 [11]

12 - Redex Foods Profile 2 [12]

13 - Redex Foods Profile 3 [13]

14 - Redex Foods Profile 4 [14]

Profile Selection Tab

1. Specify one or more of the following criteria to retrieve the supply profile:

- **Order Source:** In the Order Source field, enter the order source ID, or click the LOV  button and select an order source.
 - **Class:** In the Class field, enter the class ID, or click the LOV  button and select a class.
 - **SKU:** In the SKU field, enter the SKU ID, or click the LOV  button and select a SKU.
 - **Supply Profile:** In the Supply Profile field, enter the supply profile ID, or click the LOV  button and select a supply profile.
2. Click **Search**. The Supply Profile area displays profiles that match your criteria.
 3. Select the profile you want to set as the working profile.
 4. Click **Set To Working Supply Profile**. The working profile appears in the header and the Edit Attributes tab is enabled.

Edit the Profile Name

Navigate: Log into Data Management. From the General menu, select Profiles. On the Profile Maintenance primary tab, select the Profile Selection secondary tab.

1. Set a profile as the working profile.
2. Click **Edit**. The Edit Supply Profile window opens.



Edit Supply Profile Window

3. In the Profile Name field, enter the profile name.
4. Click **Save**. You are prompted to confirm your decision.
5. Click **OK**.

Delete a Profile

Navigate: Log into Data Management. From the General menu, select Profiles. On the Profile Maintenance primary tab, select the Profile Selection secondary tab.

1. Set a profile as the working profile.
2. Click **Delete**. You are prompted to confirm your decision.
3. Click **OK**.

Note: You must assign SKUs associated with the profile to a new profile before you can delete it. SKUs in a direct profile cannot be moved.

Update Store Order Cycle Associated with a Profile

Navigate: Log into Data Management. From the General menu, select Profiles. On the Profile Maintenance primary tab, select the Profile Selection secondary tab.

1. Set a profile as a working profile.
2. Select the Edit Attributes tab.
3. Select the Store Order Cycle tab. The store order cycle currently assigned to the profile is displayed to the right of the Store Order Cycle field.

Data Management Online - General - Profiles - Profile Maintenance - Edit Attributes - Store Order Cycle

Warehouse Store General

Create Edit Delete Search Display Clear Criteria Clear Results Clear All Apply Save Refresh Help Exit

Class to Profile Assignment Planning Group Maintenance Profile Maintenance Profile Exceptions

Selected Profile 193 - V5165 FRITO-LAY, INC. **Profile Association** Direct Supplier

Profile Selection Edit Attributes

Store Order Cycle SKUs Warehouse Network Group Home Warehouse

Effective Date 09/14/2006

Store Order Cycle None

Current Store Order Cycle

Sep							Sep						
T	F	S	S	M	T	W	T	F	S	S	M	T	W
14	15	16	17	18	19	20	21	22	23	24	25	26	27

Default Settings

S	M	T	W	T	F	S

Store Order Cycle Tab

4. In the Effective Date field, select the date the new store order cycle becomes effective.
5. In the Store Order Cycle field, enter the store order cycle ID, or click the LOV  button and select a store order cycle.
6. Click **Display** to view the real-time order cycle and the selected order cycle's default settings.
7. Click **Save**. You are prompted to confirm your decision.
8. Click **OK**.

Assign SKUs to a Profile

Navigate: Log into Data Management. From the General menu, select Profiles. On the Profile Maintenance primary tab, select the Profile Selection secondary tab.

The screenshot shows the 'Data Management Online - General - Profiles - Profile Maintenance' window. The 'General' menu is selected, and the 'Profile Maintenance' tab is active. The 'Profile Selection' sub-tab is chosen. The 'Selected Profile' is '13 - Redex Foods Profile 3 [13]'. The 'Profile Association' is 'Direct Supplier'. The 'Order Source' is 'V100003 - Redex Foods', and 'Class', 'SKU', and 'Supply Profile' are all set to 'None'. A 'Set To Working Supply Profile' button is visible. The 'Supply Profile' list shows four profiles: '11 - Redex Foods Profile 1 [11]', '12 - Redex Foods Profile 2 [12]', '13 - Redex Foods Profile 3 [13]' (selected), and '14 - Redex Foods Profile 4 [14]'.

Order Source	Class	SKU	Supply Profile
V100003 - Redex Foods	None	None	None

Set To Working Supply Profile

Supply Profile

- 11 - Redex Foods Profile 1 [11]
- 12 - Redex Foods Profile 2 [12]
- 13 - Redex Foods Profile 3 [13]
- 14 - Redex Foods Profile 4 [14]

Profile Selection tab

1. Set a profile as a working profile.
2. Select the Edit Attributes tab.

3. Select the SKUs tab.

Data Management Online - General - Profiles - Profile Maintenance - Edit Attributes - SKUs

Warehouse Store General

Class to Profile Assignment | **Planning Group Maintenance** | **Profile Maintenance** | **Profile Exceptions**

Selected Profile 1 - North London Profile 1 [1] **Profile Association** Warehouse

Profile Selection | **Edit Attributes**

Store Order Cycle | **SKUs** | **Warehouses** | **Network Group** | **Home Warehouse**

Effective Date 08/06/2005

Class 015 - Department 15

Supplier None

Supply Profile None

☐ **Unassigned SKUs**

SKU	Current Supply Profile
00100027 - Juloy Pizza Bases	2 - North London Profile 2 [2]
00100032 - Reconstituted Lettuc	3 - North London Profile 3 [3]
00100041 - Fried Green Peppers	3 - North London Profile 3 [3]
00100058 - Char Grilled Pasta S	5 - Oxifen Trading Co Profile 1 [5]
00100059 - Char Grilled Pasta *	5 - Oxifen Trading Co Profile 1 [5]
00100111 - Sainsbury's Baked Bea	5 - Oxifen Trading Co Profile 1 [5]
00100112 - Sainsbury's Baked B *	5 - Oxifen Trading Co Profile 1 [5]
00100142 - Fried Shallots	5 - Oxifen Trading Co Profile 1 [5]
00100143 - Fried Shallots *	5 - Oxifen Trading Co Profile 1 [5]
00100151 - Reconstituted Pizza	5 - Oxifen Trading Co Profile 1 [5]
00100152 - Organic Baby Food	5 - Oxifen Trading Co Profile 1 [5]
00100087 - Reconstituted Baked	7 - Oxifen Trading Co Profile 3 [7]
00100088 - Reconstituted Bake *	7 - Oxifen Trading Co Profile 3 [7]
00100058 - Char Grilled Pasta S	8 - Organicom Produce Profile 1 [8]
00100059 - Char Grilled Pasta *	8 - Organicom Produce Profile 1 [8]
00100087 - Reconstituted Baked	8 - Organicom Produce Profile 1 [8]
00100088 - Reconstituted Bake *	8 - Organicom Produce Profile 1 [8]
00100111 - Sainsbury's Baked Bea	8 - Organicom Produce Profile 1 [8]
00100112 - Sainsbury's Baked B *	9 - Organicom Produce Profile 2 [9]

SKU
00100000 - Sainsbury's Fish Sto
00100001 - Sainsbury's BBQ Char
00100002 - Sainsbury's BBQ Cha *
00100003 - Organic Pasta Penne
00100004 - Organic Ready Salted
00100005 - Organic Ready Salt *
00100006 - Budget Onions
00100007 - Budget Onions *
00100008 - Organic Bread
00100009 - Super Size Nappies
00100010 - Spicy Hot Whipped Cr
00100011 - Super Size Chinese N
00100012 - Organic Milk
00100013 - Tinned Cheddar Chees

SKUs Tab

4. Select one or more criteria to retrieve the available SKUs:

- **Class:** In the class field, enter the class ID, or click the LOV  button and select a class.
- **Supplier:** In the Supplier field, enter the supplier ID, or click the LOV  button and select a supplier.
- **Supply Profile:** In the Supply Profile field, enter the supply profile ID, or click the LOV  button and select a profile that is different from the working profile.
- Select the Unassigned SKUs check box to search for SKUs that are not assigned to a profile.

Note: If you select the Unassigned SKUs check box, you cannot search by supply profile, since you are searching for SKUs that are currently not assigned to any profile. The Supply Profile search criteria value indicates that you are searching for SKUs currently assigned to that profile.

5. Click **Search**.

Note: The Available SKUs area displays the SKUs that are not assigned to the profile. The SKUs in working profile area displays the SKUs that are assigned to the profile on the Effective Date.

6. Move the SKUs you want in the profile to the SKUs in Working Profile area.

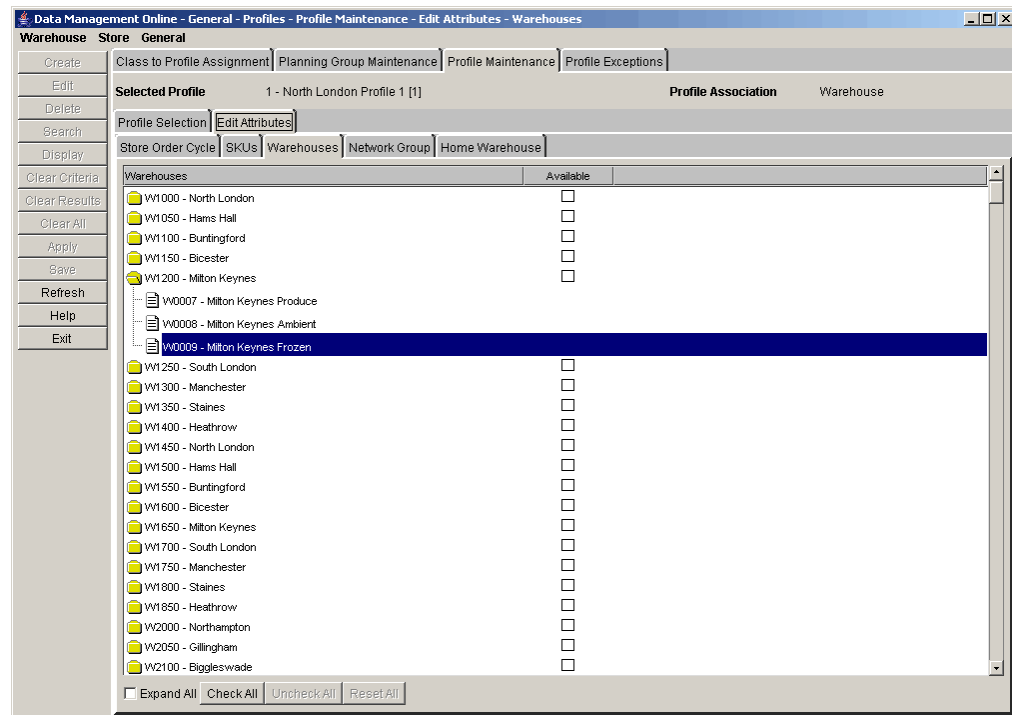
Note: SKUs that have not been saved are displayed in green.

7. Click **Save**. You are prompted to confirm your decision.
8. Click **OK**.

Maintain the Warehouse Assigned to a Profile

Navigate: Log into Data Management. From the General menu, select Profiles. On the Profile Maintenance primary tab, select the Profile Selection secondary tab.

1. Set a profile as a working profile.
2. Select the Edit Attributes tab.
3. Select the Warehouses tab. The warehouses are displayed.



Warehouses Tab

Note: The profile must have a profile association of warehouse to enable the Warehouses tab.

4. Update the warehouse selections as necessary.
 - Select the **Expand All** check box to view the warehouse chambers.
 - Select the **Available** check box next to the warehouses you wish to assign to the profile.
 - Click **Check All** to select all the available warehouses in the list.
 - Click **Uncheck All** to clear all the warehouses in the list.
 - Click **Reset All** to reset all displayed warehouses back to their saved status at any time.

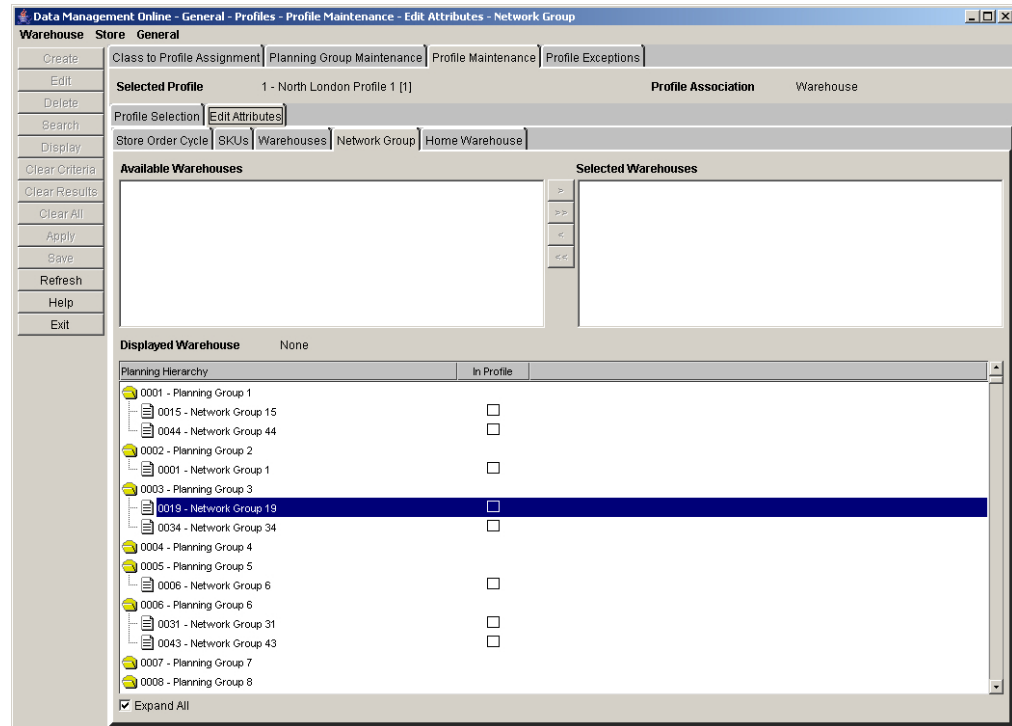
Note: The Reset All button is enabled after you make changes to the profile's warehouse associations.

5. Click **Save**. You are prompted to confirm your decision.
6. Click **OK**.

Maintain Network Groups for a Profile

Navigate: Log into Data Management. From the General menu, select Profiles. On the Profile Maintenance primary tab, select the Profile Selection secondary tab.

1. Set a profile as a working profile.
2. Select the Edit Attributes tab.
3. Select the Network Group tab. The warehouses assigned to the profile are displayed.



Network Group Tab

Note: The profile must have a profile association of warehouse to enable the Network Group tab.

4. Move the warehouses to the Selected Warehouse area.
5. Click **Display**.
6. Select the check box next to the planning group to assign a network group.
7. Click **Save**. You are prompted to confirm your decision.
8. Click **OK**.

Assign a Class to Profile

A class to profile assignment specifies a single warehouse profile to which **new** SKUs in the class will be assigned when the system is configured to perform automatic assignment based on Class. Profile assignment occurs automatically each night when new SKUs arrive in the AIP system. Each class may be assigned to one profile. Assigning a class to a profile removes the class from any previous profile it was assigned to.

You can perform multiple searches to build a cumulative list of available classes.

Assign a Class to a Working Profile

Navigate: Log into Data Management. From the General menu, select Profiles. Select the Class to Profile Assignment tab.

Class to Profile Assignment Tab

1. In the Working Profile field, enter the ID of the working profile, or click the LOV  button and select the working profile.
2. In the Profile field, enter the profile ID, or click the LOV  button and select a profile that is currently assigned to the class you are searching for.
3. In the Class field, enter the class ID, or click the LOV  button and select a class from the list.
4. Select the unassigned class check box to search for classes that are not currently assigned to a profile.
5. Click **Search** to display the classes in the Available Class list.

Note: Available classes not assigned to the working profile are displayed in black text. Classes already assigned to the working profile are displayed in red text.

6. Move the classes you want to assign to the profile to the Selected Classes area.
7. Click **Save**. You are prompted to confirm your decision.
8. Click **OK**.

Maintain Planning and Network Groups

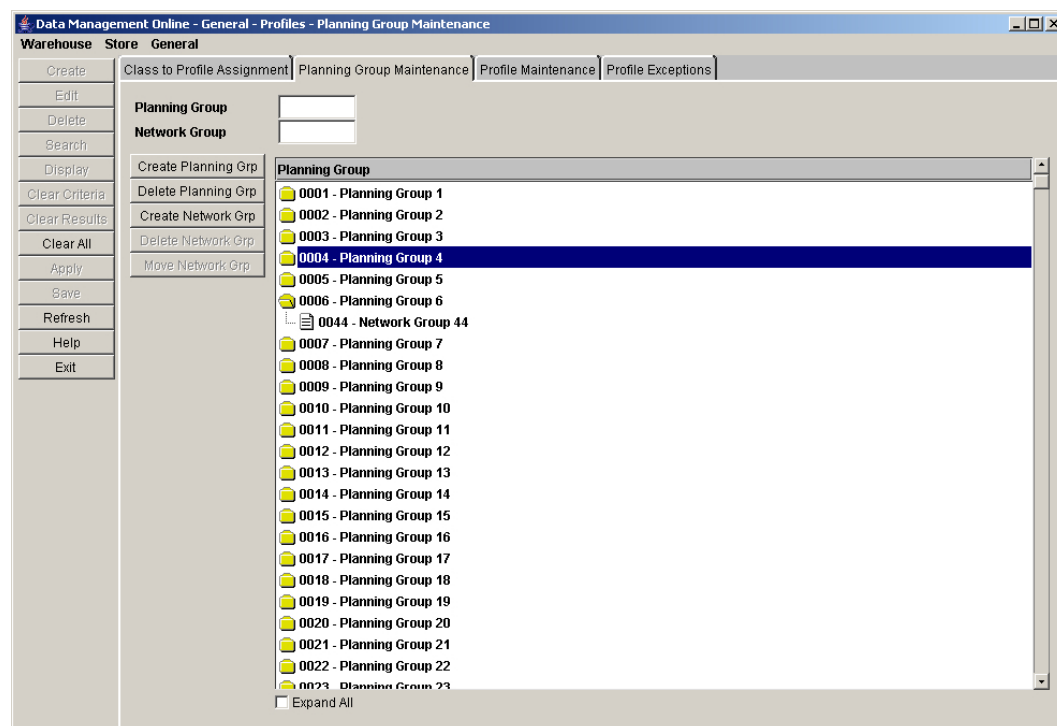
Planning and network groups are used to manage and report on the capacity in a warehouse. This functionality allows you to manage information across profiles. If Oracle Retail Warehouse Replenishment Planning is enabled, network groups can create alerts when warehouse capacities are not optimized.

A network group is a collection of similar profiles that allows easier SKU management. A planning group is a collection of network groups with common characteristics. For example, all portable music players exist in one network group, and all portable audio exist in another network group. Both of these network groups (portable music players and portable audio) exist in one planning group, called small electronics.

Planning group	Small electronics	
Network group	Portable music players	Portable audio
Profiles	Walkmans, mp3 players, discmans	Boom box, desktop radio, clock radios

Search for a Planning or Network Group

Navigate: Log into Data Management. From the General menu, select Profiles. Select the Planning Group Maintenance tab.



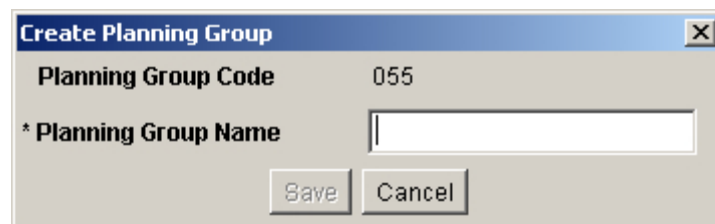
Planning Group Maintenance Tab

1. In the Planning Group field, enter the planning group ID.
2. In the Network Group field, enter the network group ID.
3. Press **Enter**. The first group that contains an ID that matches the search criteria is selected.

Create a Planning Group

Navigate: Log into Data Management. From the General menu, select Profiles. Select the Planning Group Maintenance tab.

1. Click **Create Planning Grp**. The Create Planning Group window opens.



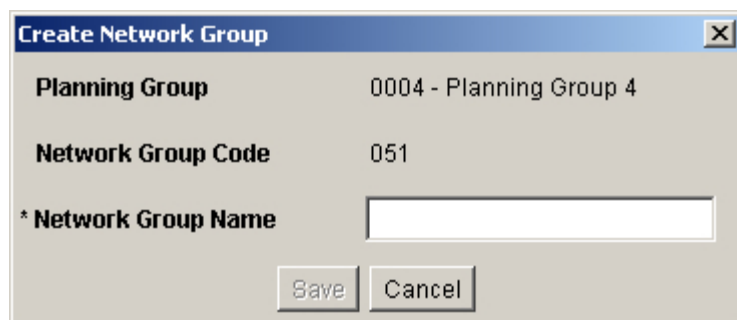
Create Planning Group Window

2. In the Planning Group Name field, enter a name for the planning group.
3. Click **Save**. You are prompted to confirm your decision.
4. Click **OK**.

Create a Network Group

Navigate: Log into Data Management. From the General menu, select Profiles. Select the Planning Group Maintenance tab.

1. Select the planning group to create the network group for.
2. Click **Create Network Grp**. The Create Network Group window opens.



Create Network Group Window

3. In the Network Group Name field, enter a name for the network group.
4. Click **Save**. You are prompted to confirm your decision.
5. Click **OK**.

Delete a Network Group

Navigate: Log into Data Management. From the General menu, select Profiles. Select the Planning Group Maintenance tab.

1. Select the network group you want to delete.

Note: You must remove profiles associated with the network group before you can delete it.

2. Select the network group to delete by clicking on its name or file icon.
3. Click **Delete Network Grp**. You are prompted to confirm your decision.
4. Click **OK**.

Delete a Planning Group

Navigate: Log into Data Management. From the General menu, select Profiles. Select the Planning Group Maintenance tab.

1. Select the planning group you want to delete.

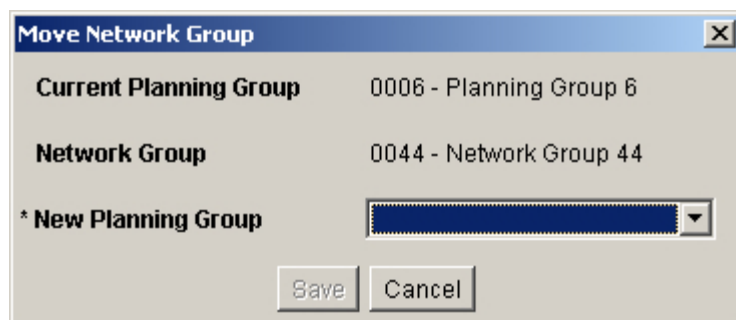
Note: You must remove network groups associated with the planning group before you can delete it.

2. Click **Delete Planning Grp**. You are prompted to confirm your decision.
3. Click **OK**.

Move a Network Group

Navigate: Log into Data Management. From the General menu, select Profiles. Select the Planning Group Maintenance tab.

1. Select the network group you want to move.
2. Click **Move Network Grp**. The Move Network Group window opens.

The screenshot shows a dialog box titled "Move Network Group" with a close button (X) in the top right corner. Inside the dialog, there are three labels with corresponding values: "Current Planning Group" with the value "0006 - Planning Group 6", "Network Group" with the value "0044 - Network Group 44", and "* New Planning Group" with a dropdown menu. At the bottom of the dialog, there are two buttons: "Save" and "Cancel".

Move Network Group Window

3. In the New Planning Group field, select the planning group you want to move the network group to.
4. Click **Save**. You are prompted to confirm your decision.
5. Click **OK**.

Profile Exceptions

Copy Profile Exceptions

The Copy Profile Exceptions window allows you to quickly set up and maintain modifications to multiple profiles. Once profile/store/day order cycle exceptions and profile/day exceptions have been set up for one profile you can apply the same exceptions to other profiles.

Copy Profile Exceptions

Navigate: Log into Data Management. From the General menu, select Profiles. On the Profile Exceptions primary tab select, the Copy Profile Exceptions secondary tab.

Copy Profile Exceptions Tab

1. In the Effective Date field, select the first date the exceptions are effective.

Note: The effective date is the day the copy begins.

2. In the Copy From area, select the profiles you want to copy the exceptions from:
 - To copy store exceptions for a day, in the Store with Exceptions field, enter a store ID, or click the LOV  and select a store.
 - To copy exceptions for supplier with direct to store delivery profiles, in the Supplier with Direct Profiles field, enter a supplier ID, or click the LOV  and select a supplier.
 - To copy exceptions from a profile, in the Profile with Exceptions field, enter the profile ID or click the LOV  button and select a profile.
3. Click **Search**.
4. In the Copy To area, select the profiles you want to copy the exceptions to:
 - To copy to a specific supplier profile, in the Supplier with Direct Profiles field, enter the supplier ID, or click the LOV  button and select a supplier.

- To copy to a specific profile, in the Profile field, enter the profile ID, or click the LOV  button and select a profile.
 - To copy to multiple profiles, move the profiles you want to edit to the Select Profiles area.
5. Click **Save**. You are prompted to confirm your decision.
 6. Click **OK**.

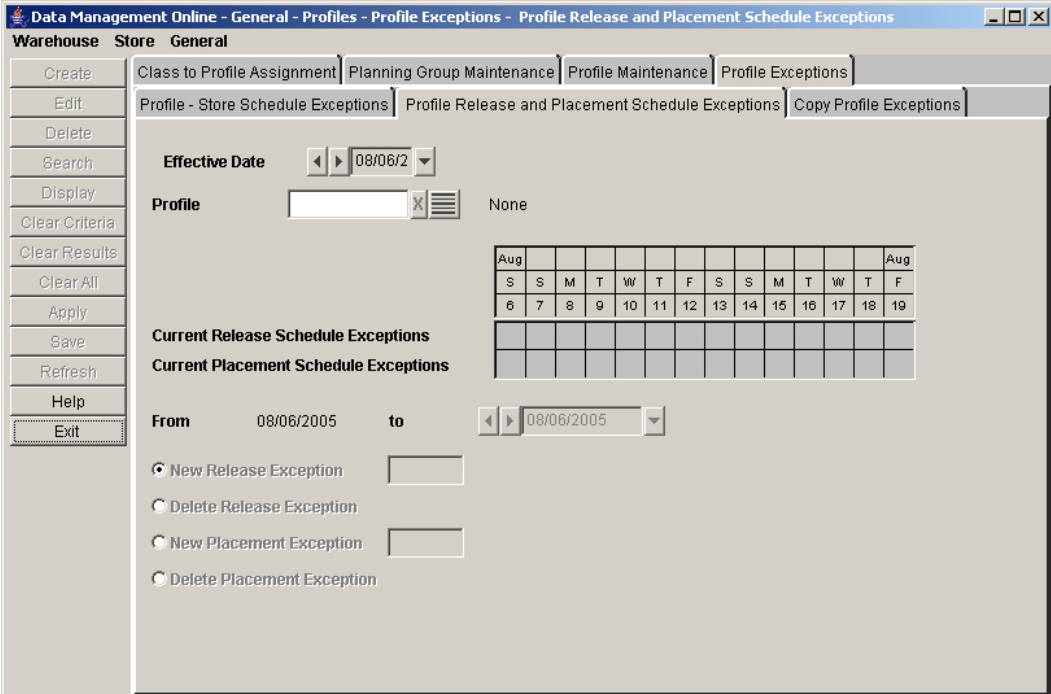
Maintain Exceptions for Release and Placement Schedule at the Profile Level

The release schedule for a profile is defined when you create the order cycle and assign it to a profile. After you associate an order cycle to a profile, you may need to create exceptions for a period of time. An exception to the order cycle at the profile level is always used instead of the default order cycle for the profile for the exception time period specified.

The Profile Release and Placement Schedule Exceptions window allows you to set exceptions to the release and placement schedule at the profile level. Release and placement schedule exceptions are entered in whole numbers representing the days that compose a lead time.

Maintain Exceptions for Release and Placement Schedule at the Profile Level

Navigate: Log into Data Management. From the General menu, select Profiles. On the Profile Exceptions primary tab, select the Profile Release and Placement Schedule Exceptions secondary tab.



Data Management Online - General - Profiles - Profile Exceptions - Profile Release and Placement Schedule Exceptions

Warehouse Store General

Class to Profile Assignment | Planning Group Maintenance | Profile Maintenance | Profile Exceptions | Profile - Store Schedule Exceptions | Profile Release and Placement Schedule Exceptions | Copy Profile Exceptions

Effective Date 08/06/2

Profile None

Aug														Aug
S	S	M	T	W	T	F	S	S	M	T	W	T	F	
6	7	8	9	10	11	12	13	14	15	16	17	18	19	

Current Release Schedule Exceptions

Current Placement Schedule Exceptions

From 08/06/2005 **to** 08/06/2005

☒ New Release Exception
☐ Delete Release Exception
☐ New Placement Exception
☐ Delete Placement Exception

Profile Release and Placement Schedule Exceptions Tab

1. In the Effective Date field, select the date the exceptions become enabled.
2. In the Profile field, enter a profile ID, or click the LOV  button and select a profile.

3. Click **Display** to view existing exceptions.
4. In the To date field, select the last date the exception is effective in the system.

Create a Release Exception

1. Select New Release Exception.
2. In the next field enter the new lead time.

Note: This field is a value, in days, between 0 and 366, inclusive.

3. Click **Save**. You are prompted to confirm your decision.
4. Click **OK**.

Delete a Release Exception

1. Select Delete Release Exception.
2. Click **Save**. You are prompted to confirm your decision.
3. Click **OK**.

Create a Placement Exception

1. Select New Placement Exception.
2. In the next field enter the new lead time.

Note: This field is a value in days between 0 and 366, inclusive.

3. Click **Save**. You are prompted to confirm your decision.
4. Click **OK**.

Delete a Placement Exception

1. Select Delete Placement Exception.
2. Click **Save**. You are prompted to confirm your decision.
3. Click **OK**.

Maintain Exceptions to the Store Order Cycle at the Profile Level

The Profile Store Schedule Exceptions window allows you to create exceptions to default order cycles at the profile/store/day level. Order cycles are created for a store when you associate an order cycle to a profile and then link the profile to the SKU and Store Source value identified for the store. The Store Source corresponds to the warehouse or supplier linked to the warehouse-profile or direct-profile, respectively.

Maintain Exceptions to the Store Order Cycle at the Profile Level

Navigate: Log into Data Management. From the General menu, select Profiles. On the Profile Exceptions primary tab, select the Profile Store Schedule Exceptions secondary tab.

Data Management Online - General - Profiles - Profile Exceptions

Warehouse Store General

Create Edit Delete Search Display Clear Criteria Clear Results Apply Save Refresh Help Exit

Class to Profile Assignment Planning Group Maintenance Profile Maintenance Profile Exceptions

Profile - Store Schedule Exceptions Profile Release and Placement Schedule Exceptions Copy Profile Exceptions

Effective Date: 08/06/2005

* Profile: None

Store Format: None

Available Stores: [Empty List]

Selected Stores: [Empty List]

Displayed Store: None

Aug	S	S	M	T	W	T	Aug
6	7	8	9	10	11	12	

Current Profile - Store Exception values

Effective from: 08/06/2005 to: 08/06/2005

☒ Profile - Store Exceptions

* Set Store Order Cycle To: None

☐ Delete Profile - Store Exceptions

Profile Store Schedule Exceptions Tab

1. In the Effective Date field, select the date the exceptions are enabled in the system.
2. In the Profile field, enter the profile ID, or click the LOV  button and select a profile.
3. In the Store Format field, enter the store format ID, or click the LOV  button and select a store format.
4. Click **Search**.
5. Move the stores you want to create exceptions for to the Selected Stores area.
6. Select a store in the Selected Stores area.
7. Click **Display**.
8. In the To date field, select the last date the exceptions are enabled in the system.

Create an Exception to a Profile's Store Order Cycle

1. Select Profile – Store Exceptions option.
2. In the Store Order Cycle To field, enter the store order cycle ID, or click the LOV  button and select a store order cycle.
3. Click **Save**. You are prompted to confirm your decision.
4. Click **OK**.

Delete an Exception to a Profile's Store Order Cycle

Navigate: Log into Data Management. From the General menu, select Profiles. On the Profile Exceptions primary tab, select the Profile Store Schedule Exceptions secondary tab.

1. Select Delete Profile – Store Exceptions option.
2. Click **Save**. You are prompted to confirm your decision.
3. Click **OK**.

Define Supplier Minimums and Container Size

A Scaling Group is a group of Suppliers, SKUs, and warehouses whose Purchase Orders can be grouped together for the purposes of meeting Supplier Minimums and building full containers.

Supplier Minimums: Many retailers negotiate contracts with suppliers which either require a minimum purchase or provide financial benefit to the retailer for meeting an agreed minimum purchase—usually specified as a cost or quantity.

Containers: Transportation management is generally treated as a separate business process from replenishment planning. However some of the costs associated with the transportation of products may be reduced if the retailer orders quantities that make full use of available container capacity.

AIP is in a unique position to address Supplier Minimums and to make use of container capacity because of its forward looking plan. Since AIP has visibility to the future planned need it can make intelligent decisions about what items to select to meet the minimum. AIP can use the future plans to identify what the actual expected need is in the short term whereas a system which does not have future visibility would have to make an arbitrary decision about which SKUs will be ordered to meet the minimum.

Defining supplier minimums and container size enables you to pool orders together to achieve higher efficiencies in purchasing and logistics.

Supplier and Container Scaling Groups

The Supplier and Container Scaling Groups tab allows you to select a working Scaling Group to view, maintain, or delete.

Selecting Scaling Groups

Navigate: Log into Data Management. From the General menu, select Scaling. On the Supplier and Container Scaling Groups primary tab select the Select tab.

Supplier and Container Scaling Groups: Select tab

1. In the Effective Batch Date field, select an effective date using the calendar  button.
2. Specify one or more of the following criteria to retrieve Scaling Groups:
 - **Supplier:** Enter the supplier ID, or click the LOV  button and select a supplier.
 - **Class:** In the Class field, enter the class ID, or click the LOV  button and select a class.
 - **SKU:** Enter the SKU ID, or click the LOV  button and select a SKU.
 - **Warehouse:** Enter the warehouse ID, or click the LOV  button and select a warehouse.
 - **Scaling Group:** Enter the scaling group ID, or click the LOV  button and select a scaling group.
 - **Supplier Scaling Status:** Select Active or Inactive from the dropdown list.
 - **Container Scaling Status:** Select Active or Inactive from the dropdown list.
3. Click **Search**. Scaling Groups meeting the selected criteria are listed in the Scaling Group list.
4. Highlight a Scaling Group from the Scaling Group list.
5. Click **Set As Working Group**.

Creating Scaling Groups

Navigate: Log into Data Management. From the General menu, select Scaling. On the Supplier and Container Scaling Groups primary tab select the Select tab.

1. To open the Create Scaling Group window, click **Create**.

Create Scaling Group window

- Complete the fields in the Create Scaling Group window as described in the table below.

Field	Parameters	Use
Scaling Group Code	Any combination of alpha-numeric characters up to 5 characters in length	A unique code for the scaling group.
Scaling Group Name	Up to 64 characters in length	An identifying name for the scaling group.
Notes	Up to 1,000 characters in length	Informational details for the scaling group.
Supplier Scaling	Select or Deselect the checkbox	Enables or disables the Supplier Scaling Horizon Days
Supplier Scaling Horizon Days	Up to 3 digits in length with a value greater than 0. Must be equal to or less than the Scaling Horizon Max system parameter and the maximum planning horizon.	Available if the Supplier Scaling checkbox is selected. Performs supplier scaling for the number of days specified..
Container Scaling	Select or Deselect the checkbox	Enables or disables the Container Scaling Horizon Days and Container Assignments.
Container Scaling Horizon Days	Up to 3 digits in length with a value greater than 0. Must be equal to or less than the Scaling Horizon Max system parameter and the maximum planning horizon.	Available if the Container Scaling checkbox is selected. Performs container scaling for the number of days specified..
Container Assignments	Select either Same as Scaling Group or Expand Scaling Groups .	Available if the Container Scaling checkbox is selected. Determines whether containers are built for one source/destination each or all in the Scaling Group.

- To save your Scaling Group, click **Save**.

Editing Scaling Groups

Allows you to view and edit the header level details of an existing scaling group

Navigate: Log into Data Management. From the General menu, select Scaling. From the Supplier and Container Scaling Groups primary tab select the Select tab.

1. Select a Scaling Group.
2. Click **Edit**.

Edit Scaling Group

Scaling Group Code: 12345

Scaling Group Name: Long March Shoe Company

Notes: Contract 22498885b effective until March 15

Supplier Scaling ☐

Supplier Scaling Horizon Days:

Container Scaling ☐

Container Scaling Horizon Days:

Container Assignments

☒ Same as Scaling Group ☐ Expand Scaling Group

Save Cancel

Edit Scaling Group window

3. Modify any necessary fields and then click **Save**.

Assignments for Scaling Groups

The Assignments tab allows you to view and edit assignments currently saved for a selected Effective Batch Date.

Navigate: Log into Data Management. From the General menu, select Scaling. From the Supplier and Container Scaling Groups primary tab select the Assignments tab.

Supplier and Container Scaling Groups: Assignments tab

Selecting and Viewing Assignments for Scaling Groups

1. In the Effective Batch Date field, select an effective date using the calendar  button.
2. Specify one or more of the following criteria to retrieve available assignments:
 - Scaling Group: Enter the scaling group ID, or click the LOV  button and select a scaling group.
 - Warehouse: Enter the warehouse ID, or click the LOV  button and select a warehouse.
 - Supplier: Enter the supplier ID, or click the LOV  button and select a supplier.
 - Class: In the Class field, enter the class ID, or click the LOV  button and select a class.
 - SKU: Enter the SKU ID, or click the LOV  button and select a SKU.
 - Unassigned SKUs: Selecting this checkbox returns unassigned supplier, SKUs, and warehouses.

3. Click **Search**. Available Assignments meeting the selected criteria are listed in the Available Assignments list.
4. Use the arrow controls to move available assignments to the Selected Assignments list or back to the Available Assignments list
5. Use the **Expand All** check boxes to display the full folder structure of the lists in the Available Assignments and Selected Assignments areas.
6. Press **Display**. The Current Assignments list shows the assignments currently saved for the selected Effective Batch Date.

Editing Assignments for Scaling Groups

1. Display the desired assignment by Viewing Assignments for Scaling Groups.
2. Follow the instructions in the table below to edit assignments.

To:	First:	And then click:
remove an assignment from the scaling group, without moving it into a new scaling group	highlight the row in the Current Assignments grid	Delete.
remove an assignment from the scaling group in the future	select a Last Effective Batch Date, highlight the row in the Current Assignments grid, select the Update Last Batch Run Date checkbox	Set Date.
remove a Last Batch Run Date	highlight the row in the Current Assignments grid, select the Update Last Batch Run Date checkbox	Remove Date.
reset an assignment's saved Last Batch Run Date	highlight the row in the Current Assignments grid, select the Update Last Batch Run Date checkbox	Reset Date

3. Click Save.

Constraints for Scaling Groups

The Constraints tab allows you to view, create, edit or delete current and future constraints. The Constraints grid is pre-populated with currently saved data

Navigate: Log into Data Management. From the General menu, select Scaling. From the Supplier and Container Scaling Groups primary tab select the Constraints tab.

Data Management Online - Scaling - Scaling Groups

Warehouse Store General **Scaling**

Create Edit Delete Search Display Clear Criteria Clear Results Clear All Apply Save Refresh Help Exit

Supplier and Container Scaling Groups

Selected Scaling Group V12341234 - Mad Sheep Sau1 CS_RG

Container Scaling Status Inactive

Supplier Scaling Status Active

Container Assignments Same as Scaling Group

Select Assignments Constraints

Effective Release Date	To Release Date	Minimum	Maximum	UOM	Primary Container Constraint
30-Jan-2008	15-Mar-2008				
- Supplier Constraints - Minimum Cost 4500.00 USD - Minimum Case Qty 25 Case - Container Constraints - Container Weight 2200.00 Pounds - Container Pallet Qty 25 28 Pallet					
16-Mar-2008	No End Date				
- Supplier Constraints - Container Constraints - Container Weight 2200.00 Pounds - Container Pallet Qty 25 28 Pallet					

Expand All

Supplier and Container Scaling Groups: Constraints tab

Creating New Constraints

The Create Scaling Group Constraints window allows you to create constraints for a new Release Date or make additions and minor future adjustments for a different release date and/or Scaling Group

Navigate: Log into Data Management. From the General menu, select Scaling. From the Supplier and Container Scaling Groups primary tab select the Constraints tab.

- From the Constraints tab, click **Create**. The **Create Scaling Groups Constraints** window opens with either the Supplier Constraints tab or Container Constraints tab displays, depending on which scaling modules are enabled.

Create Scaling Group Constraints

Copy From Scaling Group [X] V12341234 - Mad Sheep Sau1 CS_RG

Copy From Date [03/16/2008] Copy

Effective Release Date [03/16/2008] To Release Date [] No End Release Date

Supplier Constraints Container Constraints

Cost

Currency USD

Minimum []

Quantity

Type Pallets Cases Eches

Minimum []

Save Clear Cancel

Create Scaling Groups Constraints: Supplier Constraints tab

Create Scaling Group Constraints

Copy From Scaling Group:

Copy From Date:

Effective Release Date: ☐ To Release Date:

☒ No End Release Date

Supplier Constraints | Container Constraints

Volume
UOM: Cubic Feet
Minimum: Maximum:

Weight
UOM: Pounds
Minimum: Maximum:

Quantity
Type: ☐ Pallets ☒ Cases ☐ Eaches
Minimum: Maximum:

Cost
Currency: USD
Minimum: Maximum:

Primary Constraint: Tolerance: %

Create Scaling Groups Constraints: Container Constraints tab

Entering Container Constraints

Note: You should first decide if the constraints will initially be populated based on existing constraints. To populate constraints from an existing set of constraints you should first select the appropriate scaling group from which the existing constraints are copied.

1. In the Copy from Scaling Group field, enter the Scaling Group, or click the LOV button and select a Scaling Group.
2. In the Copy From Date field, use the calendar button to select a desired date up to year in the past and up to a year in the future.
3. Click **Copy**.
4. In the Effective Release Date field, use the calendar button to select a desired date for which all the constraints are saved.
5. Select a To Release Date or select No End Release Date.
6. Enter minimum and maximum values for these constraints:
 - Volume
 - Weight
 - Quantity
 - Cost

Note: These are optional constraints, but entered values must be greater than 0. At least one maximum must be entered.

7. Select a Primary Constraint from the drop-down list.
8. In the Tolerance field, enter a percentage value between 0 and 50.
9. Click **Save**.

Entering Supplier Constraints

Note: If both Container and Supplier constraints are found, during a copy, you have the option to populate just the Supplier Constraints, or both. You must then reset the Effective Release Date and end date option for which all constraints are saved.

1. Verify the Effective Release Date and end date options.
2. Enter Supplier values for Cost and Quantity.
3. Click **Save**.

Editing Constraints for Scaling Groups

The Constraints grid is pre-populated with currently saved data. Editing allows you to:

- add additional constraints to an existing set
- modify the effective release dates
- modify existing constraints
- change the primary container constraint

Note: Constraints set for today's date cannot be changed.

Navigate: Log into Data Management. From the General menu, select Scaling. From the Supplier and Container Scaling Groups primary tab select the Constraints tab.

1. To edit the constraints, select a folder or constraint and click **Edit**. The **Edit Scaling Groups Constraints** window opens with either the Supplier Constraints tab or Container Constraints tab displays, depending on which row was selected.

Edit Scaling Group Constraints

Scaling Group: V12341234 - Mad Sheep Sau1 CS_RG

Effective Release Date: 03/16/2008 ☐ To Release Date ☒ No End Release Date

Supplier Constraints | Container Constraints

Cost

Currency: USD

Minimum:

Quantity

Type: ☐ Pallets ☒ Cases ☐ Eaches

Minimum:

Save Reset Cancel

Edit Scaling Groups Constraints: Supplier Constraints tab

Edit Scaling Group Constraints

Scaling Group: V12341234 - Mad Sheep Sau1 CS_RG

Effective Release Date: 01/25/2008 ☐ To Release Date ☒ No End Release Date

Supplier Constraints | Container Constraints

Volume

UOM: Cubic Feet

Minimum: Maximum:

Weight

UOM: Pounds

Minimum: 22000.00 Maximum: 25000.00

Quantity

Type: ☒ Pallets ☐ Cases ☐ Eaches

Minimum: 25 Maximum: 28

Cost

Currency: USD

Minimum: Maximum:

Primary Constraint: Quantity

Tolerance: 0 %

Save Reset Cancel

Edit Scaling Groups Constraints: Container Constraints tab

2. Make any changes to the Effective Release Date.
3. Update any values to these constraints:
 - Volume
 - Weight

- Quantity
- Cost
- Primary Constraint
- Tolerance

Note: To revert to any saved values, click **Reset**.

4. Click **Save**.

Deleting Constraints for a Scaling Group

Navigate: Log into Data Management. From the General menu, select Scaling. From the Supplier and Container Scaling Groups primary tab select the Select tab.

1. Follow the steps for Selecting a Scaling Group.
2. Select the **Constraints** tab.
3. Highlight the **Effective Release Date** folder of the constraints to delete.
4. Click **Delete**.

Note: The currently effective constraints will be end dated with today's date instead of deleted. Future effective constraints are permanently deleted.

SKU Attribute Maintenance

The SKU Attribute Maintenance tab allows you to enter and modify attributes of SKUs that can be set at the Class and/or SKU level.

Pull Forward Days is a maximum number of days which a purchase order's delivery date can be moved ahead of its original delivery date during Supplier Scaling or Container Scaling. To set this value the business should first do a cost/benefit analysis of storing extra inventory versus the expected efficiencies/savings to be gained by Scaling. For example, if storage space at the warehouse is at a premium or the logistics of storing extra volume of a product will quickly outweigh the savings then the pull forward days should be smaller. If the product is inexpensive from a budgetary and/or storage perspective or is high volume then the pull forward days might be longer relative to other products. The pull forward days is also a critical limitation for short life products which can spoil if not sold within a reasonable amount of time. All of these considerations must be taken into account when setting the Pull Forward Days.

Search for Classes and SKUs

Navigate: Log into Data Management. From the General menu, select the Scaling menu option. Select the SKU Attribute Maintenance tab opens.

SKU Attribute Maintenance tab

- Specify one or more of the following criteria to retrieve Class values and SKUs:
 - Class:** In the Class field, enter the class ID, or click the LOV  button and select a class.
 - SKU:** In the SKU field, enter the SKU ID, or click the LOV  button and select a SKU.
- Click **Search**. The Class area displays the Classes and their SKUs that match your criteria.

Change Values for of All Displayed Classes or SKUs

Navigate: Log into Data Management. From the General menu, select the Scaling menu option. The SKU Attribute Maintenance tab opens.

- Search for Classes and SKUs.
- In the Set All area, select either **Classes** or **SKUs**.
- Enter the number of **Pull Forward Days**. The number of **Pull Forward Days** must be a value equal to or greater than 0 and less than 100.
- Click **Update**. All the displayed Classes or SKUs are set to the same value with the modified rows shown in green text.
- Click **Save**. You are prompted to confirm your decision.
- Click **OK**.

Change Values for a Single Displayed Class or SKU

Navigate: Log into Data Management. From the General menu, select the Scaling menu option. The SKU Attribute Maintenance tab opens.

- Search for Classes and SKUs.

2. In the Classes area, double click the **Pull Forward Days** value of either a Class or SKU. The field becomes editable.
3. Clear the field or enter the number of **Pull Forward Days**. The number of **Pull Forward Days** must be equal to or greater than 0 and less than 100.

Note: At the class level a blank value is the same as 0 which means no Pull-forward will occur by default. At the SKU level a blank value indicates that the Class default value applies.

4. Repeat until all values are set appropriately. All the modified rows shown in green text.
5. Click **Save**. You are prompted to confirm your decision.
6. Click **OK**.

Store

Maintain the store source

Perform a Mass Update of the Store Sources

The Store Source Mass Update window allows you to create or change the store source for multiple SKUs at multiple stores. You can limit the SKUs and stores created or updated by specifying SKU characteristic, store characteristic, and additional SKU/location attributes.

Create or Change the Source for Multiple Locations and SKUs

Navigate: Log into Data Management. From the Store menu, select Core Data. On the Store Source primary tab, select the Store Source Mass Update tab.

Data Management Online - Store - Core Data - Store Source Mass Update

Warehouse Store General

Create Edit Delete Search Display Clear Criteria Clear Results Clear All Apply Save Refresh Help Exit

Store Source Store Source Multi SKU Store Source Multi Store Store Source Mass Update

Effective Date 08/09/2005

SKU Selection

Supplier		X	None
Profile		X	None
Class		X	None
SKU Attribute Type		X	None
SKU Attribute Value		X	None
SKU		X	None

Store Selection

Store Format		X	None
Default Warehouse		X	None
Default Warehouse CSC		X	None
Store		X	None

Further Limit SKU/Store Selection To

Existing Source Type

Existing Source

Set Source To

☒ Warehouse

☐ Direct Supplier

☐ Default Warehouse

☐ Default Warehouse CSC

Store Source Mass Update Tab

1. In the Effective Date field, enter the date the change occurs.
2. In the SKU Selection area, enter the criteria you want to use to search for the SKUs you want to update.
3. In the Store Selection area, select the store criteria you want to use to search for stores that receive the SKUs from the new source.
4. In the Further Limit SKU Store Selection area, select the source type as necessary.
5. In the Set Source To area, select the new source for the SKUs and stores combination.
6. Click **Save**. You are prompted to confirm your decision.
7. Click **OK**.

Maintain Store Source by SKU

The Store Source tabs allow you to view the store source for warehouse and direct supplied SKUs. The store source indicates the single supplier or warehouse that supplies the SKUs to the store. The Store Source Multi Store tab allows you to select one SKU and view all stores – at which the SKU is on-supply for the selected effective date – and the associated sources of any particular store displayed. You can change a source for a specific store with a repeating pattern or with a specific source going forward from the effective date chosen.

Patterns

Provides the ability to define different sources, either suppliers or warehouses, that supply a store on various days of the week. When you create a pattern for a week, the pattern repeats indefinitely, or until you create a new pattern.

Effective Date

When you select the Effective Date option, you are creating a single source, either a supplier or warehouse, for a store. When you set the effective date, the source supplies the store indefinitely.

Search for Store Source by SKU

Navigate: Log into Data Management. From the Store menu, select Core Data. On the Store Source primary tab, select the Store Source Multi Store secondary tab.

Store Source Multi Store tab

1. In the Effective Date field, select an effective date using the calendar button.
2. In the Class field, enter the class ID, or click the LOV button and select a class.
3. In the SKU field, enter the SKU ID or click the LOV button and select a SKU.
4. Click Search.
5. Move the stores that you want to edit to the Selected area.

Note: Any changes saved will only apply to stores in the Selected area.

6. In the Selected area, select a store.
7. Click Display. The source ID for the SKU/store is displayed.

Define a Store Source Pattern for a SKU/Store

Navigate: Log into Data Management. From the Store menu, select Core Data. On the Store Source primary tab, select the Store Source Multi Store secondary tab.

1. Search for store source by SKU.
2. Select the Repeating Pattern option.
3. In the Source field, click the LOV button to select the source that supplies the selected store.

4. Select the check box associated with each day for which you wish to create a repeating source pattern. The pattern will be created using the source from the Source LOV  button.
5. Click Populate to create the source pattern.

Note: You can select a different source for each day. This allows you to set up a repeating pattern that uses different source values across the days of the week.

6. Clear the check boxes and repeat steps 3 – 5 until each day in the week has a source value populated in it.
7. Click Save. You are prompted to confirm your decision.
8. Click OK.

Define a Single Source for the SKU/Store

Navigate: Log into Data Management. From the Store menu, select Core Data. On the Store Source primary tab, select the Store Source Multi Store secondary tab.

1. Search for store source by SKU.
2. Select the Effective Date option.
3. In the Source field, click the LOV  button to select the source that supplies the selected store.

Note: The effective date is the date you select when searching for the store source by SKU.

4. Click Save. You are prompted to confirm your decision.
5. Click OK.

Maintain Store Source by Store

The Store Source tabs allow you to view and maintain the store source for warehouse and direct supplied SKUs. The store source indicates the supplier or warehouse that supplies the SKUs to the store. The Store Source Multi SKU tab allows you to select one store and view all SKUs, which are on-supply at the store on the selected effective date, and the associated sources for any SKUs displayed. You can change a source for a specific SKU with a repeating pattern or with a specific source going forward from the effective date chosen.

Patterns

Allow you to define multiple sources, either suppliers or warehouses, that supply a store on various days of the week. When you create a pattern for a week, the pattern repeats indefinitely, or until you create a new pattern.

Effective Date

When you select the Effective Date option, you are creating a single source, either a supplier or warehouse, for a store. When you set the effective date, the source supplies the store indefinitely.

Search for a Store Source by Store

Navigate: Log into Data Management. From the Store menu, select Core Data. On the Store Source primary tab, select the Store Source Multi SKU secondary tab.

Data Management Online - Store - Core Data

Warehouse Store General

Store Source

Store Source Multi SKU | Store Source Multi Store | Store Source Mass Update

Effective Date: 08/06/2005

Profile: None

Store Format: None

* Store: S0000000001 - Wellingbridge

* Class: 001 - Department 1

Available SKUs

Selected SKUs

- 00100149 - Budget Baby Food
- 00100355 - Spicy Hot Grapes

SKU	08/06/2005	08/07/2005	08/08/2005	08/09/2005	08/10/2005	08/11/2005	08/12/2005
00100149 - Budget Baby Food	W2050	W2050	W2050	W2050	W2050	W2050	W2050

Repeating Pattern * Source: W1300 - Manchester

S ☐ M ☒ T ☐ W ☐ T ☐ F ☐ S

W1300

Effective Date 08/06/2005 * Source: None

Store Source Multi SKU Tab

1. In the Effective Date field, select an effective date using the calendar button.
2. In the Profile field, enter the profile ID, or click the LOV button and select a profile.
3. In the Store Format field, enter the store format ID, or click the LOV button and select a store format.
4. In the Store field, enter the store ID, or click the LOV button and select a store.
5. In the Class field, enter the class ID, or click the LOV button and select a class.
6. Click Search.
7. Move the SKUs that you want to edit to the Selected area.

Note: Any changes saved will only apply to SKUs in the Selected SKUs area.

8. In the Selected area, select a SKU.
9. Click Display. The source ID for the SKU/store is displayed.

Define a Store Source Pattern for a SKU/Store

Navigate: Log into Data Management. From the Store menu, select Core Data. On the Store Source primary tab, select the Store Source Multi SKU secondary tab.

1. Search for store source by store.
2. Select the Repeating Pattern option.
3. In the Source field, click the LOV  button to select the source that supplies the selected store.
4. Select the check box associated with each day for which you wish to create a repeating source pattern. The pattern will be created using the source from the Source LOV  button.
5. Click Populate to create the source pattern.

Note: You can select a different source for each day. This allows you to set up a repeating pattern that uses different source values across the days of the week.

6. Clear the check boxes and repeat steps 3 – 5 until each day in the week has a source value populated in it.
7. Click **Save**. You are prompted to confirm your decision.
8. Click **OK**.

Define a Single Source for the SKU/Store

Navigate: Log into Data Management. From the Store menu, select Core Data. On the Store Source primary tab, select the Store Source Multi SKU secondary tab.

1. Search for store source by store.
2. Select the Effective Date option.
3. In the Source field, click the LOV  button to select the source that supplies the selected store.

Note: The effective date is the date you select when searching for the store source by SKU.

4. Click Save. You are prompted to confirm your decision.
5. Click OK.

Define Store Defaults and Exceptions

Define Store Defaults

Define Store Priority

Store priorities are used to determine how the replenishment needs of a store are met in times of warehouse shortage and surplus. Until you assign a store priority, the default priority for the store is 1 – Super High.

Define Store Priority

Navigate: Log into Data Management. From the Store menu, select Store Data. Select the Store Priority tab.

The screenshot shows the 'Data Management Online - Store - Store Data - Store Priority' window. The 'Store Format' is set to '1 - Traditional'. The 'Store' field is empty. The 'Search' button is visible. The window displays a list of stores with their IDs and names, and a column for Priority. The Priority column is currently set to '3 - Normal' for all stores. The window also includes a sidebar with buttons like Create, Edit, Delete, Search, Display, Clear Criteria, Clear Results, Clear All, Apply, Save, Refresh, Help, and Exit.

Store	Priority
S303 - MISHAWAKA IN	3 - Normal
S309 - HOBART IN	3 - Normal
S348 - EASTPOINTE MI	3 - Normal
S402 - NAPERVILLE IL	3 - Normal
S411 - MORGANTOWN WV	3 - Normal
S413 - LENEXA KS	3 - Normal
S441090 - MINNEAPOLIS CSC	3 - Normal
S441105 - CHICAGO CSC	3 - Normal
S443 - DES MOINES IA	3 - Normal
S445 - BISMARCK ND	3 - Normal
S467 - LOMBARD IL	3 - Normal
S475 - WAUKESHA WI	3 - Normal
S990 - NewAIPStore	3 - Normal
S991 - NewAIPStore2	3 - Normal
S992 - NewAIPStore3	3 - Normal
S993 - NewAIPStore4	3 - Normal
S994 - NewAIPStore5	3 - Normal

Store Priority Tab

1. In the Store Format field, select a format.
2. In the Store field, enter a store ID, or click the LOV  button and select a store.
3. Click Search.
4. In the Priority column, click on the store priority to enable the field.
5. Select the appropriate store priority.
6. Click Save. You are prompted to confirm your decision.
7. Click OK.

Define Pack Sizes for Stores

The store format pack assigns the default ordering pack sizes to a store, by store format. First you select the store format and assign the default pack size for the stores that meet the format criteria. Then you create exceptions for stores within the format to order alternate pack sizes. You can define store/pack sizes from the supplier or the warehouse.

Assign a Default, Orderable SKU-Pack Size from a Supplier to the Store

Navigate: Log into Data Management. From the Store menu, select Store Data. On the Store Format Packsize Defaults primary tab, select the Direct To Store Defaults secondary tab.

Direct to Store Defaults Tab

1. In the Effective Date field, select an effective date using the calendar  button.
2. In the Supplier field, enter the supplier ID, or click the LOV  button and select a supplier.

Note: The list of suppliers is limited to suppliers associated with a supplier profile.

3. In the SKU field, enter the SKU ID, or click the LOV  button and select a SKU.
4. Click Display. Existing data for the formats, supplier, and SKU for a period of 14 days are displayed, beginning with the effective date.
5. In the Selected Store Format field, select the store format that you want to apply the changes to.
6. In New Pack Size Selection field, select a SKU pack size.

Note: The SKU-pack sizes displayed are limited to the pack sizes of the SKU available from the supplier.

7. Click Save. You are prompted to confirm your decision.
8. Click OK.

Create Exceptions to the Orderable SKU-Pack Size from a Supplier to the Store

Navigate: Log into Data Management. From the Store menu, select Store Data. On the Store Format Packsize Defaults primary tab, select the Direct To Store Exceptions secondary tab.

Direct To Store Exceptions Secondary Tab

1. In the Effective Date field, select an effective date using the calendar button.
2. In the Supplier field, enter the supplier ID, or click the LOV button and select a supplier.

Note: The list of suppliers is limited to suppliers associated with a supplier profile.

3. In the SKU field, enter the SKU ID, or click the LOV button and select a SKU.
4. Click **Search**.
5. Move the stores that you want to edit to the Selected Stores area.

Note: Any changes saved will only apply to stores in the Selected Stores area.

6. In the Selected Stores area, select a store.
7. Click Display. The pack size default for the store is displayed.
8. To create a pack size exception
 - a. Select the Enter Pack Size Exceptions radio button.
 - b. In the To date field, select the last date the exception is effective.
 - c. In the New Pack Size Selection field, select the SKU-pack size that you want to replace the default pack size.
9. To delete a pack size exception:
 - a. Select the Delete Pack Size Exceptions radio button.
 - b. In the To date field, select the last date the exception is effective.

10. Click Save. You are prompted to confirm your decision.
11. Click OK.

Assign a Default, Orderable SKU-Pack Size from a Warehouse to the Store

Navigate: Log into Data Management. From the Store menu, select Store Data. On the Store Format Packsize Defaults primary tab, select the Warehouse to Store Defaults secondary tab.

Warehouse to Store Defaults Tab

1. In the Effective Date field, select an effective date using the calendar  button.
2. In the Class field, enter the class ID, or click the LOV  button and select a class.
3. In the SKU field, enter the SKU ID, or click the LOV  button and select a SKU.
4. Click **Search**.
5. Move the warehouses that you want to edit to the Selected Warehouses area.

Note: Any changes saved will only apply to warehouses in the Selected Warehouses area.

6. In the Selected Warehouses area, select a warehouse.
7. Click Display. The pack size default for the store format is displayed.
8. In the Store Format field, select the store format that you want to apply the changes.
9. In New Pack Size Selection field, select a SKU pack size.

Note: The SKU-pack sizes displayed are limited to the pack sizes of the SKU available from the supplier.

10. Click Save. You are prompted to confirm your decision.
11. Click OK.

Create Exceptions to the Orderable SKU-Pack Size from a Warehouse to the Store

Navigate: Log into Data Management. From the Store menu, select Store Data. On the Store Format Packsize Defaults primary tab, select the Warehouse to Store Exceptions secondary tab.

Warehouse to Store Exceptions Tab

1. In the Effective Date field, select an effective date using the calendar button.
2. In the Class field, enter the class ID, or click the LOV button and select a class.
3. In the SKU field, enter the SKU ID or click the LOV button and select a SKU.
4. In the Warehouse field, enter the warehouse ID, or click the LOV button and select a warehouse.

Note: The list of suppliers is limited to suppliers associated with a supplier profile.

5. In the SKU field, enter the SKU ID or click the LOV button and select a SKU.
6. Click Search
7. Move the stores that you want to edit to the Selected Stores area.

Note: Any changes saved will only apply to stores in the Selected Stores area.

8. In the Selected Stores area, select a store.
9. Click Display. The pack size default or exception for the store is displayed.
10. To create a pack size exception:

- a. Select the Enter Pack Size Exceptions radio button.
 - b. In the To date field, select the last date the exception is effective.
 - c. In the New Pack Size Selection field, select the SKU-pack size that you want to replace the default pack size.
11. To delete a pack size exception:
 - a. Select the Delete Pack Size Exceptions radio button.
 - b. In the To date field, select the last date the exception is effective.
12. Click Save. You are prompted to confirm your decision.
13. Click OK.

Maintain On Supply and Off Supply Dates for a SKU

On supply and off supply dates drive the replenishment process for Oracle Retail store replenishment batch process. They indicate the period of time over which a SKU at a store needs to be replenished. The on sale and off sale dates are the dates when the product will go on sale or off sale in the store. Typically, a SKU is assigned an on-supply date prior to the on sale date so that inventory is available in the store on the on sale date. Similarly, a SKU is assigned an off supply date prior to the off sale date so that inventory is depleted when the off sale date is reached.

The On Supply/Off Supply tab allows you to modify the on supply/off supply dates which are initially generated in a nightly batch process. This window also allows you to view a store's current on supply and off supply dates.

The On Supply/Off Supply tab allows you to update on supply and off supply dates for an individual SKU and store combination or for large numbers of SKUs and stores.

Search for SKUs with On Sale Dates

Navigate: Log into Data Management. From the Store menu, select Store Data. Select the On Supply/Off Supply tab.

On Supply/Off Supply Tab

1. Select the Select SKUs option.
2. In the Class field, enter the class that contains the SKU you are searching for, or click the LOV button and select the class.
3. In the SKU field, enter a SKU or click the LOV button and select a SKU.
4. Click Search. Results that match are displayed in the Available SKUs with On Sale Dates area.
5. Move the SKUs you want to view or change to the Selected SKUs with On Sale Dates area.
6. In the Store field, enter the store for which you want to view on supply/off supply information for the selected SKU, or click the LOV button and select a store.

Note: You can only view on Supply and Off Supply date for one SKU/store at a time.

7. Click Display.

Search for SKUs with Future On Sale Dates

Navigate: Log into Data Management. From the Store menu select Store Data. Select the On Supply/Off Supply tab.

ii.

1. Select the SKUs with future on sale dates option.
2. In the Class field, enter the class that contains the SKUs you are searching for, or click the LOV button and select the class.

Maintain On Supply/Off Supply Dates for a Store

Navigate: Log into Data Management. From the Store menu select Store Data. Select the On Supply/Off Supply tab.

1. Search for and retrieve supply dates for a store:
 - Search for SKUs with on sale dates.
 - Search for SKUs with future on sale dates.
2. When the Select SKUs option is selected, move the appropriate SKUs to the Selected SKUs with On Sale Dates area.
3. Select the store you want to apply the changes to.
 - a. In the Apply to area, select the Store option.
 - b. In the field to the right, enter a store ID, or click the LOV button and select a store you want to apply the changes to.

OR

- c. In the Apply area, select the Store Format field.
- d. In the field to the right, select the store format you want the changes applied to.
4. Specify on-supply and off-supply dates for the locations you selected.
 - a. In the On Supply Date area, select:
 - New On Supply Date: Allows you to pick a new date the locations selected should be supplied with the selected SKUs.
 - Retain Existing On Supply Date: Allows you to use the currently defined on supply date for the item.
 - b. In the Off Supply Date area, select:
 - New Off Supply Date: Allows you to pick a new date the locations selected should no longer be supplied with the selected SKUs.
 - Retain Existing Off Supply Date: Allows you to use the currently defined off supply date for the item.
 - No Date: Allows you to indicate that the SKUs selected for the location are always supplied.
5. Click Save.

Define Promotion Start and End Dates

The Promotional Start and End Dates window allows you to modify promotional start and end dates for a warehouse/store/SKU combination. This information is used by Oracle Retail supply chain processing to ensure that enough stock exists in the warehouse to fulfill the expected increase in demand at the store during the promotion.

In order for you to save your changes, the end date of a promotion must not overlap the date range of any other promotions.

Search for Warehouse/Store/SKUs on Promotion Dates

Navigate: Log into Data Management. From the Store menu, select Store Data. On the Store Product Defaults & Exceptions primary tab, select the Promotional Start and End Dates secondary tab.

Promotional Start End Dates Tab

1. Enter search criteria to retrieve existing promotional exceptions.
 - In the Warehouse field, enter the warehouse ID, or click the LOV  button and select a warehouse.
 - In the Store Format field, enter the store format ID, or click the LOV  button and select a store format.
 - In the Store field, enter the store ID, or click the LOV  button and select a store.
 - In the Class field, enter the class ID, or click the LOV  button and select a class.
 - In the SKU field, enter the SKU ID, or click the LOV  button and select a SKU.
2. Click Search.

Update the Promotion Dates

1. Search for warehouse/store/SKUs promotional dates.
2. Select the dates you want to modify.
 - In the Promotional Start Date field, select the appropriate start date for the promotion.
 - In the Promotional End Date, select the appropriate end date for the promotion.
3. Click Save. You are prompted to confirm your decision.
4. Click OK.

Define Store Exceptions

Maintain Exceptions to the Release and Placement Schedules

The Release and Placement Schedule Exception window allows you to set new SKU/store release and placement schedule exceptions in two ways. The first is by entering an integer value that represents either the release lead time or the placement lead time. The second is by selecting an alternate order cycle to be used in place of the default. You can also use this screen to delete existing exceptions.

Search for SKUs and Stores

Navigate: Log into Data Management. From the Store menu, select Store Data. On the Store Product Defaults & Exceptions primary tab, select the Release and Placement Schedule Exceptions secondary tab.

Release and Placement Schedule Exceptions Tab

1. Select an effective date using the standard date selection control.
2. Enter search criteria to retrieve existing exceptions.
 - In the Store Format field, enter the store format ID or click the LOV  button and select a store format.
 - In the Store field, enter the store ID or click the LOV  button and select a store.
 - In the Class field, enter the class ID or click the LOV  button and select a class.
3. Click Search to retrieve available SKUs.

4. Move a SKU from the Available SKU area to the Selected SKUs area.
5. Select a SKU.
6. Click Display.

Create a Release Exception

1. In the To date field, enter the last day the exception is enabled in the system.
2. Select New Release Exception.
3. In the next field enter the new lead time.

Note: This field is a value, in days, between 0 and 366, inclusive.

4. Click Save. You are prompted to confirm your decision.
5. Click OK.

Delete a Release Exception

1. In the To date field, enter the last day the exception is enabled in the system.
2. Select Delete Release Exception.
3. Click Save. You are prompted to confirm your decision.
4. Click OK.

Create a Placement Exception

1. In the To date field, enter the last day the exception is enabled in the system.
2. Select New Placement Exception.
3. In the next field enter the new lead time.

Note: This field is a value, in days, between 0 and 366, inclusive.

4. Click Save. You are prompted to confirm your decision.
5. Click OK.

Delete a Placement Exception

1. In the To date field, enter the last day the exception is enabled in the system.
2. Select Delete Placement Exception.
3. Click Save. You are prompted to confirm your decision.
4. Click OK.

Create a SKU/Store Release Exception

1. In the To date field, enter the last day the exception is enabled in the system.
2. Select New SKU/Store Release Exception.
3. In the Set Store Order Cycle To field, select the new store order cycle using the LOV



button.

4. Click Save. You are prompted to confirm your decision.
5. Click OK.

Delete a SKU/Store Release Exception

1. In the To date field, enter the last day the exception is enabled in the system.
2. Select Delete SKU/Store Release Exception.
3. Click Save. You are prompted to confirm your decision.
4. Click OK.

Maintain Exceptions to the SKU Release Schedule

The SKU Release Schedule Exceptions window allows you to set exception to the SKU release and placement schedule at the SKU/day level. The exception is a new store order cycle that will overlay the default order cycle.

The SKU release and placement schedule exception is set up when you select a store order cycle that is different than the profile's default order cycle.

Search for Exceptions to a SKU Release Schedule

Navigate: Log into Data Management. From the Store menu select Store Data. On the Store Product Defaults & Exceptions primary tab, select the SKU Release Schedule Exceptions secondary tab.

SKU Release Schedule Exceptions Tab

1. Select an effective date using the standard date selection control.
2. Enter search criteria to retrieve existing exceptions.
 - In the Class field, enter the class ID or click the LOV  button and select a class.
 - In the SKU field, enter the SKU ID or click the LOV  button and select a SKU.
3. Click Display.

Create an Exception for a SKU Release Schedule

Navigate: Log into Data Management. From the Store menu select Store Data. On the Store Product Defaults & Exceptions primary tab, select the SKU Release Schedule Exceptions secondary tab.

1. Search for and retrieve exceptions to a SKU release schedule.
2. In the To date field, select the last date the SKU is enabled in the system.
3. Select Set New SKU Exceptions.
4. In the Set Store Order Cycle To field, select a store order cycle using the LOV  button.

5. Click Save. You are prompted to confirm your decision.
6. Click OK.

Delete a SKU Release Schedule Exception

Navigate: Log into Data Management. From the Store menu select Store Data. On the Store Product Defaults & Exceptions primary tab, select the SKU Release Schedule Exceptions secondary tab.

1. Select Delete Any SKU Exceptions .
2. Click Save. You are prompted to confirm your decision.
3. Click OK.

Create Store Ordering Parameters

Maintain Store Order Cycles

A store order cycle indicates when a supplier or warehouse can deliver to a store. Order cycles are composed of lead times. A lead time indicates which days of the week are acceptable delivery days and the number of days before hand the source must receive the order in order to deliver on a selected day. A zero lead time represents same day, continuous replenishment. You may leave a lead time blank, which indicates that orders are not received at the store on that day.

You can only create and delete store order cycles. When you create an order cycles, the order cycle code must consist of five alphanumeric characters and be unique.

There are two types of lead times: store placement lead time and store release lead time. The store order cycle encompasses both the release lead time and the placement lead time. Typically, the lead times are the same, but for business reasons, you may choose to make the placement lead time longer than the release lead time. One possible reason to set a different placement lead time is to fix the store order quantity so orders into the store's source warehouse can be executed with the confidence that the orders will be sufficient to meet demand.

Search for an Order Cycle

Navigate: Log into Data Management. From the Store menu, select Store Ordering. Select the Order Cycle Creation/Maintenance tab.

Order Cycle Creation/Maintenance Tab

1. In the Order Cycle field, select the order cycle you wish to view from the Order Cycle LOV  button.

- Click Display.

Create an Order Cycle

Navigate: Log into Data Management. From the Store menu, select Store Ordering. Select the Order Cycle Creation/Maintenance tab.

- Click Create. The Create Order Cycle window opens.

Create Order Cycle Window

- In the Order Cycle Code field, enter a code for the order cycle.
 - In the Order Cycle Name field, enter a name for the order cycle.
 - In the Order Cycle Length field, select the length of the order cycle.
 - Enter placement lead times:
 - Double-click a cell in the Store Placement Lead Time row of the grid.
 - Enter a whole number for the lead time in the cell.
 - You must enter a store placement lead time for at least one day in the cycle.
 - If you enter a store placement lead time for a given day in the cycle, you must enter a store release lead time for the same day.
 - The store placement lead time must be greater than or equal to the store release lead time for any given day.
 - Press Enter or click away from the cell.
 - Enter store release lead times:
 - Double-click a cell in the Store Release Lead Time row of the grid.
 - Type an integer value for the desired lead time in the cell.
 - You must enter a store release lead time for at least one day in the cycle.
 - Where you enter a store release lead time for a given day in the cycle, you will also need to enter a store placement lead time for the same day.
 - The store release lead time must be less than or equal to the store placement lead time for any given day.
-
- Note:** Once you save an order cycle, it can no longer be updated.
-
- Press **Enter** or click away from the cell.
- Click **Save**. You are prompted to confirm your decision.

Delete an Order Cycle

Navigate: Log into Data Management. From the Store menu, select Store Ordering. Select the Order Cycle Creation/Maintenance tab.

1. Search for a store order cycle.
2. Click Delete. You are prompted to confirm your decision.
3. Click **OK**.

Define Non-Release and Non-Receipt Days

The Non Release/Non Receipt Days window allows you to maintain non receipt and non release dates for the entire company. You create a non-receipt day to indicate that for that particular day, no product will be received from a source. You create a non-release day to indicate that for that particular day, no product is ordered from the source.

Search for Existing Non-Release/Non-Receipt Days

Navigate: Log into Data Management. From the Store menu, select Store Ordering. Select the Non Release/Non Receipt Days tab.

Non Release/Non Receipt Days Tab

1. Select the type of date you want to search for.
2. Click the calendar  button and select the date you want to view. The existing Non Release Dates and Non Receipt Days appear in bold in their respective calendar.
3. To limit searches for non-release dates by profile, enter the profile ID in the Non-Release Date Exceptions By Profile field.
4. Click Search.

Create a Non-Receipt Day

Navigate: Log into Data Management. From the Store menu, select Store Ordering. Select the Non Release/Non Receipt Days tab.

1. Select Non-Receipt Date.
2. Click the calendar  button to select a non-receipt date.

Note: Dates in gray indicate that those dates are eligible to be created as a non-receipt day.

3. Click Create. You are prompted to confirm your decision.
4. Click OK.

Delete a Non-Receipt Day

Navigate: Log into Data Management. From the Store menu, select Store Ordering. Select the Non Release/Non Receipt Days tab.

1. Search for existing non-release/non-receipt days.

Note: Dates in bold black indicate that those dates are eligible to be deleted as a non-receipt day.

2. Click Delete. You are prompted to confirm your decision.
3. Click OK.

Create Non-Release Date

Navigate: Log into Data Management. From the Store menu, select Store Ordering. Select the Non Release/Non Receipt Days tab.

1. Select Non-Release Date.
2. Click the calendar  button to select a non-release date.

Note: Dates in gray indicate that those dates are eligible to be a non-release day.

3. Click **Create**. You are prompted to confirm your decision.
4. Click **OK**.

Create Exceptions to the Non-Release Date by Profile:

Navigate: Log into Data Management. From the Store menu, select Store Ordering. Select the Non Release/Non Receipt Days tab.

1. Search for existing non-release/non-receipt days.
2. In the Profile field, enter the beginning of the profile ID and press Enter.
3. In the Exceptions field, select Y to indicate that exceptions exist.
4. Select the check box for the profiles you want to create an exception for.
5. Click Save. You are prompted to confirm your decision.
6. Click OK.

Delete a Non-Release Date

Navigate: Log into Data Management. From the Store menu, select Store Ordering. Select the Non Release/Non Receipt Days tab.

1. Search for existing non-release/non-receipt days.

Note: Dates in bold black indicate that those dates are eligible to be deleted as a non-receipt day.

2. Click Delete. You are prompted to confirm your decision.
3. Click OK.

Edit a Non-Release Date Exception

Navigate: Log into Data Management. From the Store menu, select Store Ordering. Select the Non Release/Non Receipt Days tab.

1. Search for existing non-release/non-receipt days.
2. In the Exceptions field,
 - Select Y to indicate that exceptions exist.
 - Select N to indicate that no exceptions exist.

OR

Click Set All To No exception to clear all exceptions.

3. Click Save. You are prompted to confirm your decision.
4. Click OK.

Maintain the Store Receiving Calendar

The Store Receiving Calendar window allows you to specify the days a store is available to receive inventory. You can define the receiving schedule three different ways:

- You can create the default receiving pattern. This is the pattern that the store uses for all receiving for a SKU type.
- You can create an exception to the default receiving pattern. This is the pattern that the store uses for receiving during the time period you specify.
- You can create an exception to a specific date. The change you make only applies to the effective date you selected.

Search for a Store Receiving Schedule

Navigate: Log into Data Management. From the Store menu, select Store Ordering. Select the Store Receiving Calendar tab.

Data Management Online - Store - Store Ordering - Store Receiving Calendar

Warehouse Store General

Non Release/Non Receipt Days Order Cycle Creation/Maintenance Store Receiving Calendar

Create Edit Delete Search Display Clear Criteria Clear Results Clear All Apply Save Refresh Help Exit

Effective Date: 08/09/2005

* SKU Type: Ambient

* Store Format: All Formats

Available Stores

- S0000000001 - Wellingbridge
- S0000000002 - Mathurst
- S0000000003 - Needlefield
- S0000000005 - Harton
- S0000000006 - Mayton
- S0000000007 - Chiddingdon
- S0000000008 - Mathurst
- S0000000009 - Needlefield
- S0000000010 - Harton
- S0000000011 - Camfield
- S0000000012 - Aylesfield
- S0000000013 - Buxbridge
- S0000000014 - Oxborough
- S0000000015 - Billington
- S0000000016 - Wellinghurst

Selected Stores

- S0000000004 - Nottinghurst

Displayed Store Nottinghurst

Aug														Aug	
T	W	T	F	S	S	M	T	W	T	F	S	S	M		
9	10	11	12	13	14	15	16	17	18	19	20	21	22		
N	N	N	Y	Y	N	N	N	N	N	Y	Y	N	N		

Store Schedule

Effective Date: 08/09/2005 to 08/09/2005

☐ New Default Pattern

S	M	T	W	T	F	S
---	---	---	---	---	---	---

☐ New Exception Pattern

S	M	T	W	T	F	S
---	---	---	---	---	---	---

☒ Date Update

Store Receiving Calendar Tab

1. In the Effective date field, select the date the store can begin receiving.
2. Enter search criteria to retrieve store calendar information.
 - In the SKU type field, select a SKU type.
 - In the Store Format field, select a store format.
3. Click Search.
4. Move the store you want to update to the Selected Stores area.
5. Select a store in the Selected Stores area.
6. Click Display.

Establish a New Receiving Default Pattern

1. Select New Default Pattern.
2. For each day of the week, double click to enable the field and type:
 - Y to indicate the store is open for receiving.
 - N to indicate the store is closed for receiving.
3. Click Save. You are prompted to confirm your decision.
4. Click OK.

Create a New Store Exception Pattern

1. Select New Exception Pattern.
2. Click the To Effective Date  calendar button and select the date the exception will end.
3. For each day of the week, double click to enable the field and type:
 - Y to indicate the store is open for receiving.
 - N to indicate the store is closed for receiving.
4. Click Save. You are prompted to confirm your decision.
5. Click OK.

Create a Date Update for a Store Receiving Schedule

1. Select Date Update.
2. For the effective date you have selected:
 - Y to indicate the store is open for receiving on a specific date.
 - N to indicate the store is closed for receiving on a specific date.
3. Click Save. You are prompted to confirm your decision.
4. Click OK.

Warehouse

Define Warehouse Capacity

Maintain Receiving Windows

The Receiving Window Maintenance screen allows you to define the number of hours (not necessarily contiguous) that have been grouped together because they have some common receiving characteristic. For example, warehouses may wish to receive their dairy goods between 5am and 7am.

Once a receiving window has been set up it can be referred to by name and/or number when setting up the delivery preferences, which allow you to refer to a grouping of times rather than individual hours.

Create a Receiving Window for a Scheduling Location

Navigate: Log into Data Management. From the Warehouse menu, select Capacity Maintenance. Select the Receiving Window Maintenance tab.

Data Management Online - Warehouse - Capacity Maintenance

Warehouse Store General

Receiving Window Maintenance Slots And Shifts Maintenance

Setup Times

Available Receiving Windows

Code	Corporate Receiving Window Name
01	1
02	2
03	3
04	4
05	5
06	6
07	7

Scheduling Locations

Scheduling Locations	Tier	Linked
W1000 - North London		
W1050 - Hams Hall		
W1100 - Buntingford		
W1150 - Bicester		
W1200 - Milton Keynes		
W1250 - South London		
W1300 - Manchester		
W1350 - Staines		
W1400 - Heathrow		
W1450 - North London		

☐ Expand All

Check All Uncheck All Reset All

Receiving Window Maintenance - Setup Tab

1. Click Create. The Create Receiving window opens.

Create Receiving Window

Receiving Window Code 52

Receiving Window Name

Save Cancel

Create Receiving Window

2. In the Receiving Window Name field, enter a name.

Note: The name can be up to 32 characters and must contain at least one non-space character.

3. Click Save. You are prompted to confirm your decision.
4. Click OK.

Maintain the Receiving Window

Navigate: Log into Data Management. From the Warehouse menu, select Capacity Maintenance. Select the Receiving Window Maintenance tab.

1. Select an Available Receiving Window.
2. To edit the receiving window name:
 - a. Click Edit. The Edit Receiving window opens.

Edit Receiving Window

- b. In the Receiving Window Name field, specify a name for the receiving window.
3. To delete a receiving window;
 - a. Click **Delete**. You are prompted to confirm your decision.
 - b. Click OK.

Note: You can delete a receiving window if no delivery group associations are associated with the scheduling location.

4. Click Save. You are prompted to confirm your decision.
5. Click **OK**.

Associate Scheduling Locations with a Receiving Window

Navigate: Log into Data Management. From the Warehouse menu, select Capacity Maintenance. Select the Receiving Window Maintenance tab.

1. Select a receiving window.
2. Click Display.
3. To view locations:
 - Double-click a folder
 - Select the Expand All check box.
4. In the Linked column, select the check box to the right of a location to indicate that the scheduling location is available for the selected receiving window.
5. Click Apply.

Note: The associations are not saved until times are assigned and saved.

6. Select the Times tab.

Data Management Online - Warehouse - Capacity Maintenance - Times

Warehouse Store General

Receiving Window Maintenance Slots And Shifts Maintenance

Setup Times

Effective Date: 08/09/2005

Available Receiving Windows: 05 - 5

Available Scheduling Locations:

- W1550 - Buntingford
- W1850 - Heathrow

Selected Scheduling Locations:

Expand All

Displayed Scheduling Location: None

Model From: 08/09/2005

Apply To:

View Date: 08/09/2005

Day-Of-Week Default: Sun Mon **Tue** Wed Thu Fri Sat

Exception Date: 08/09/2005 to 08/09/2005

Slots with Capacity	00:01	01:00	02:00	03:00	04:00	05:00	06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00
Receiving Window	00:01	01:00	02:00	03:00	04:00	05:00	06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00

Receiving Window Maintenance - Times Tab

7. In the Effective Date field, select the date you want the changes to occur.
8. In the Available Receiving Windows field, select the receiving window that you want to create times for.
9. Move the locations you want to update to the Selected Schedule Locations area.
10. Select the Location you want to make changes to.
11. Click **Display**. Existing times are displayed.

Create a Day of the Week Default

1. In the Apply To area, select Day of the Week Default.
2. To the right of Day of the Week Default, select the day of the week that you want to create times for.
3. In the Receiving Window area, select the hour you want to include.

Note: To select the hour, click on the time. The block turns red when it is selected.

4. To remove existing exceptions for the day of the week, select the Remove Any Exceptions check box.
5. Click Save. You are prompted to confirm your decision.
6. Click OK.

Create an Exception

1. In the Apply To area, select Exception Date.
2. In the To date field, select the last day the exception occurs
3. In the Receiving Window area, select the hours you want to include..

Note: To select the hour, click on the time. The block turns red when it is selected.

4. Click Save. You are prompted to confirm your decision.
5. Click OK.

Delete Exceptions

1. In the Apply To area, select Delete Exceptions.
2. In the To date field, select the last date the exception occurs
3. Click Save. You are prompted to confirm your decision.
4. Click OK.

Maintain Slots and Shifts

The Slots and Shifts Maintenance window allows you to view, model, and maintain shifts and slots for scheduling locations. Shifts and slots are created to identify valid vehicle delivery times, as well as to manage the capacity of goods received during a given shift.

Notional Days

A notional day is a 24 hour period of time. This period may cover two different dates. The notional date can be composed of a single day of 24 hours or of the calendar date and the previous day. When you create slots and shifts, they are composed of notional days and defined for particular calendar days. When you create slots, at least one slot must exist for the calendar day of the Effective Notional Day.

Slots

When you create a shift you must create the first slot, which will be the first slot, chronologically, when you create the shift. As you add additional slots, the slot may change position in the chronological order. A slot is a time of day and exists as part of a shift. Each slot has a vehicle capacity and pallet capacity. The cumulative total of the capacity of the slots determines the maximum capacity of the shift.

Valid slot times are:

- Times that do not overlap other slots within the notional day.
- Times that do not overlap the previous or next shift.
- Times that are not more than 23hrs and 30 minutes after the first slot already in the notional receiving day.
- Times that are not more than 23hrs and 30 minutes before the last slot already in the notion day receiving day.

Shifts

A shift represents a period of time during a day of the week and is a collection of slots. A shift is composed of one or more slots. Before you can create a shift, you must create at least one slot for the shift.

A shift does not have a pre-defined start and end time. Instead, the start time and end time of the shift is defined by the earliest and latest slot time. The slot times within one shift cannot overlap with any other shift.

The maximum capacity of the shift defines the total capacity of goods that can be received at the scheduling location within the timeframe of that shift.

When defining the shift's maximum capacity it will be no greater than the sum of the slot's maximum capacities. Often times it will be less since over the entire time span of the shift it would be impossible to operate at maximum receiving capacity.

Day of the Week Defaults

The day-of-week defaults are shift and slot values that are used week after week. This indefinite repetition allows for more efficient maintenance of the shifts and slots by ensuring that delivery times are available.

When you create a new default, you can create it for a single day or multiple days and then saved for the week. The default applies only to the days you select. When you save a shift, DMO validates it to ensure that the notional day does not overlap any defaults or exceptions that may already exist. In the following example, the new shift cannot be created since the existing shift time overlaps.

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Existing		11p.m. (Tuesday) - 11a.m. (Wednesday)					
New			10 am (Wednesday) - 9:30 p.m. (Thursday)				

Once created, a day of the week default is enabled indefinitely. New defaults can be created for future dates, which then end any previous defaults. You cannot save a blank day of the week default. You must delete all shifts and slots for a day of the week default. Changes and deletions to slots and shift changes are enabled in the system on the effective date. Similarly, before a DOW default can be deleted validation will be done to ensure no vehicles are scheduled for that day, from the effective date onward.

Vehicles

A slot and shift must exist for a vehicle to deliver to a location on a day of the week. A validation process checks when changes or deletions are made to check the vehicles schedules. If a vehicle schedule exists;

- A default can be deleted if an exception exists for the scheduled delivery dates.
- An exception can be deleted if a default exists for the scheduled delivery dates.

If a vehicle is scheduled for delivery you must have a default or exception slot time scheduled in order to receive it.

Exceptions

You can create exceptions for future dates. Exceptions are typically created for a short period of time. You must specify the start date, and end date of an exception. An exception only applies to the dates specified in the date range. An exception always overrides any existing day of the week defaults for the specified date. Exceptions can be created even when no defaults exist.

Search for a Day of Week Default at a Scheduling Location

Navigate: Log into Data Management. From the Warehouse menu, select Capacity Maintenance. Select the Slots and Shifts Maintenance tab.

Slots and Shifts Maintenance Tab

1. In the Effective Notional Date field, select the date you want to search defaults for.
2. Move the locations you want to update to the Selected Scheduling Locations area.
3. Select the Location you want to view or model your changes from.
4. Click Display. Existing shifts and slots are displayed.

Create a Shift

Navigate: Log into Data Management. From the Warehouse menu, select Capacity Maintenance. Select the Slots and Shifts Maintenance tab.

1. Search for a day of week default at a scheduling location.
2. Select Day-of-Week Default or Exception Date option you want to create a shift for.

Note: The chosen View Date determines the Day displayed in the grid. The day is a visual aid for modeling the Shifts and Slots. The Day-Of-Week Default and Exception Dates determine the actual days the Shifts and Slot times apply to.

3. Click Add Shift. The Add Shift window opens.

Add Shift Window

4. In the Actual Day of Week field, select the actual day of the Notional Date that the slot exists.

Note: This determines which calendar day of the week the slot occurs. This is necessary since a notional receiving day can cross two calendar days. This option is not available when you are adding the first shift for the day. This is done to enforce the rule that at least one Slot exists on the calendar day.

5. In the Start Time for Slot, select a start time for the slot.

Note: This defines the first slot for the shift. If you want to create slots before or after this, you must add slot to the shift.

6. In the Slot Capacity in Vehicles field, enter the total number of vehicles the location can receive for the slot.
7. In the Slot Capacity in Boards/Pallets field, enter the total number of boards or pallets the location can receive for the slot. The scheduling location Capacity Type defines the value you are entering, the number of boards or pallets.
8. Click Apply. The shift and slot displays in the work area. The shift will be placed in the tree according to its start time.
9. Make changes to the slots and shifts as necessary:
 - Add a slot
 - Add a shift
 - Delete a slot
 - Delete a shift

Add a Slot to a Shift

Navigate: Log into Data Management. From the Warehouse menu, select Capacity Maintenance. Select the Slots and Shifts Maintenance tab.

1. Search for a day of week default at a scheduling location.
2. In the work area, select the shift you want to add a slot to.
3. Click Add Slot. The Add Slot window opens.

Add Slot Window

4. In the Actual Day of Week field, select the actual day of the Notional Date that the slot exists.

Note: This determines which calendar day of the week the slot occurs. This is necessary since a notional receiving day can cross two calendar days. This option is not available when no valid Start Times for Slot can be on the pervious calendar day and not break the rule that the Shifts cannot span more than 23 1/2 hours.

5. In the Start Time for Slot, select a start time for the slot

Note: This defines the first slot for the shift. If you want to create slots before or after this, you must add slot to the shift.

6. In the Slot Capacity in Vehicles field, enter the total number of vehicles the location can receive for the slot.
7. In the Slot Capacity in Boards/Pallets field, enter the total number of boards or pallets the location can receive for the slot. The scheduling location Capacity Type defines the value you are entering, the number of boards or pallets.
8. Click Apply. The shift and slot displays in the work area. The shift will be placed in the tree according to its start time.

Delete a Shift

Navigate: Log into Data Management. From the Warehouse menu, select Capacity Maintenance. Select the Slots and Shifts Maintenance tab.

1. Search for a day of week default at a scheduling location.
2. Select the shift you want to delete.
3. Click Delete.

Delete a Slot

Navigate: Log into Data Management. From the Warehouse menu, select Capacity Maintenance. Select the Slots and Shifts Maintenance tab.

1. Search for a day of week default at a scheduling location.
2. Select the slot you want to delete.
3. Click Delete.

Maintain Defaults and Exceptions

Navigate: Log into Data Management. From the Warehouse menu, select Capacity Maintenance. Select the Slots and Shifts Maintenance tab.

1. Search for a day of week default at a scheduling location.

Note: Any changes you make are enabled in the system on the Effective Date you select in your search.

2. In the Apply To area, select the type of update you want to make to the shift
 - Select Day-Of-Week Default to create a new default for the select day of the week.
 - Select Delete Day-Of-Week Default to remove existing defaults for a day of the week.
 - Select Exception Date to create exceptions for the date range you select.
 - Select Delete Exceptions to remove exceptions for the date range you select.
3. Make changes to the slots and shifts as necessary:
 - Add a shift
 - Add a slot
 - Delete a shift
 - Delete a slot
4. Click **Save**. You are prompted to confirm your decision.
5. Click OK.

Create a Day of Week Default

Navigate: Log into Data Management. From the Warehouse menu, select Capacity Maintenance. Select the Slots and Shifts Maintenance tab.

1. Search for a day of week default at a scheduling location.
2. To model from an existing set of shifts and slots:
 - a. Select one scheduling location to model from.
 - b. In the View Date field, select the date you want to use as a model.
 - c. Click **Display**.

Note: The Model From option indicates whether the default or exception values are currently displayed. The scheduling location's exception dates will be bolded in the View Date calendar.

3. In the Apply To area:
 - a. Select Day-Of-Week Default.
 - b. Click on the days in the week to highlight which days the default applies. Click on a selected day-of-week to clear the selection.
 - c. Select the Delete Any Exceptions check box to remove any existing exceptions.
 - d. Makes changes to the slots and shifts as necessary.
4. Click **Save**. You are prompted to confirm your decision.
5. Click OK.

Delete Day of Week Default

Navigate: Log into Data Management. From the Warehouse menu, select Capacity Maintenance. Select the Slots and Shifts Maintenance tab.

1. Search for a day of week default at a scheduling location.
2. In the Apply To section, select Delete Day-Of-Week Default.
3. Click on the days in the week to highlight which days the default applies. Click on a selected day-of-week to clear the selection.
4. Select the Delete Any Exceptions check box to remove any existing exceptions.
5. Click Save. You are prompted to confirm your decision.
6. Click OK.

Create an Exception Date

Navigate: Log into Data Management. From the Warehouse menu, select Capacity Maintenance. Select the Slots and Shifts Maintenance tab.

1. Search for a day of week default at a scheduling location.
2. To model from an existing set of shifts and slots:
 - a. Select one scheduling location to model from.
 - b. In the View Date field, select the date you want to use as a model.
 - c. Click Display.

Note: The Model From option indicates whether the default or exception values are currently displayed. The scheduling location's exception dates will be bolded in the View Date calendar.

- In the Apply To area:
- d. Select Exception Date.
 - e. In the To date field, select the last date the exception is valid.
 - f. Makes changes to the slots and shifts as necessary.
 3. Click **Save**. You are prompted to confirm your decision.
 4. Click OK.

Delete an Exception Date

Navigate: Log into Data Management. From the Warehouse menu, select Capacity Maintenance. Select the Slots and Shifts Maintenance tab.

1. Search for a day of week default at a scheduling location.
2. To delete an existing set of shifts and slots:
 - a. Select one scheduling location to model from.
 - b. In the View Date field, select the date you want to use as a model.
 - c. Click Display.

Note: The Model From option indicates whether the default or exception values are currently displayed. The scheduling location's exception dates will be bolded in the View Date calendar.

3. In the Apply To area:
 - a. Select Delete Exceptions.
 - b. In the To date field, select the last date to remove exceptions.
4. Click **Save**. You are prompted to confirm your decision.
5. Click OK.

Core Data

Delivery Groups

Create Delivery Groups

A delivery group represents a grouping of demand groups with similar delivery characteristics into a destination. Delivery groups have a number of parameters associated with them, representing the vehicle constraints associated with building trucks and delivering the trucks to the final location. These constraints are used by Oracle Retail supply chain processing to plan deliveries. If you assign multiple demand groups to the same delivery group, they must use the same truck constraints for a specific location.

Delivery groups build non-contents trucks. A non-contents truck is loaded according to system parameters. Truck constraints are defined in delivery groups. Oracle Retail Warehouse Inbound Planning uses the system parameters and the truck constraints to optimally load the truck.

Delivery groups can be manually created or system generated:

- **Manually created:** After you create the delivery group, you must assign scheduling location and demand groups to complete the delivery group. Optionally, you can also define the preferences, patterns, outbound capacity, and pallet setting.
- **System generated:** System generated delivery groups are created when the batch is run. Applicable scheduling locations are assigned to the delivery group along with default vehicle attributes. You can add or modify scheduling locations, demand groups, and vehicle attributes in the same manner as manually generated delivery groups.

Scheduling Location

A scheduling location is the chamber that a supplier or warehouse is delivering to. Delivery groups may deliver into multiple scheduling locations. The delivery constraints for each scheduling location into which a delivery group can deliver are maintained independently.

The available and selected scheduling locations are displayed in a tree structure, scheduling location being displayed at the child level. This will display the scheduling locations associated with the working delivery group.

For each scheduling location, you must define the truck constraints that the location can handle, including:

- **Footprint:** The number of Full Pallet Equivalent (FPE) that fit in the bed of the truck.
- **Height:** The number of FPEs that can be stacked in the truck.
- **Weight:** The amount of the weight the truck can hold, including the pallet and case weights.
- **Minimum drop:** The smallest number of FPEs that must exist in a truck before it can be delivered to a location.

Assigning Demand Groups to Delivery Groups

You must assign demand groups to the delivery groups in order to identify the delivery characteristics of the demand group's SKU-pack sizes. Demand group assignments also allow you to indicate which SKUs are delivered into each location that you have selected. When you search for demand groups, the results of available demand groups are grouped by source. For each source at each location, you must indicate which demand groups are valid for the delivery group. Once a source/demand group combination has been assigned to a delivery group for a specific scheduling location, it must always be assigned to a delivery group.

Create a Delivery Group

Navigate: Log into Data Management. From the Warehouse menu, select Core Data. Select the Delivery Groups tab.

The screenshot shows the 'Data Management Online - Warehouse - Core Data - Delivery Groups' window. The 'Delivery Groups' tab is active. The 'Selected Delivery Group' is '0000000041 - Bicester Romeo'. The 'Delivery Group Type' is 'Contents'. The 'Automated Demand Group Assignment' is 'No'. The 'Delivery Group Source' is 'W1350 - Staines'. The 'Effective Date' is '09/20/2005'. The 'Tier' is '1'. The 'Scheduling Location' is 'None'. The 'Order Source' is 'None'. The 'Demand Group' is '0000000041 - Bicester Romeo'. The 'Set To Working Delivery Group' button is visible. Below the main form, there is a table with columns: Delivery Group, Scheduling Location, Order Source, and Demand Group. The table contains a list of delivery groups and their associated locations and sources.

Delivery Group	Scheduling Location	Order Source	Demand Group
0000000041 - Bicester Romeo	W215001 - Ashford Produce	V000001 - Chemiprox Produce	
	W160001 - Bicester Produce	V000002 - Recom Foods	
	W210001 - Biggleswade Produce	V000003 - Grodex Foods	
	W110001 - Buntingford Chill	V000005 - Chemidex Produce	
	W155001 - Buntingford Produce	V000006 - Groflex Trading Co	
	W230001 - Green Bay Produce	V000007 - Chemiplant Trading Co	
	W220001 - Crewe Chill	V000009 - Dualplant Trading Co	
	W205001 - Gillingham Chill	V000010 - Organiceil Trading Co	
	W105001 - Hams Hall Chill	V000011 - Organidex Produce	
	W150001 - Hams Hall Produce	V000012 - Organiflex Foods	
	W140001 - Heathrow Produce	V000013 - Organiflex Foods	
	W185001 - Heathrow Produce	V000014 - Astraflex Foods	
	W130001 - Manchester Produce	V000015 - Oxiflex Trading Co	
	W175001 - Manchester Produce	V000016 - Dualcom Produce	
	W120001 - Milton Keynes Chill	V000017 - Organiceil Produce	
	W165001 - Milton Keynes Chill	V000018 - Omnicom Trading Co	
	W100001 - North London Ambient	V000019 - Dualtrack Foods	
	W145001 - North London Frozen	V000021 - Sunplant Produce	
	W200001 - Northampton Produce	V000022 - Organiplant Foods	
	W125001 - South London Ambient	V000023 - Grodex Trading Co	
	W170001 - South London Frozen	V000024 - Reprox Produce	
	W135001 - Staines Produce	V000025 - Organiflex Foods	
	W160002 - Bicester Chill	V000026 - Technoprox Produce	
	W210002 - Biggleswade Frozen	V000027 - Camtech Foods	
	W110002 - Buntingford Ambient	V000028 - Nyltech Produce	
	W155002 - Buntingford Chill	V000029 - Grocom Trading Co	
	W230002 - Green Bay Chill	V000030 - Refen Foods	
	W220002 - Crewe Ambient	W1350 - Staines	
	W205002 - Gillingham Ambient		
	W105002 - Hams Hall Ambient		
	W185002 - Heathrow Ambient		
	W140002 - Heathrow Chill		
	W130002 - Manchester Ambient		
	W175002 - Manchester Frozen		
	W120002 - Milton Keynes Ambient		

Delivery Groups Tab

1. Click **Create**. The Create Delivery Groups window is displayed.

The screenshot shows the 'Create Delivery Groups' window. The 'Tier' is set to '1'. The 'Name' field is empty. The 'Delivery Group Source' field is empty with a LOV button. The 'Suffix' field is empty. The 'Delivery Group Type' is set to 'Non-Contents'. The 'Delivery Group Code' field is empty. The 'Automated Demand Group Assignment' checkbox is unchecked. The 'Save' and 'Cancel' buttons are at the bottom.

Create Delivery Groups Window

2. In the Name field, enter the delivery group name.
3. In the Delivery Group Source field, enter the ID of the source for the delivery group, or click the LOV button and select the source.
4. In the Suffix field, enter a suffix. A suffix is a numerical value 3 digits in length.

5. Select the Automated Demand Group Assignment checkbox to indicate the system should automatically create demand group assignments for this delivery group when new SKU-pack sizes arrive in the AIP system.

Note: The automated delivery group assignments are created for the Delivery Group Source and the Delivery Group's Scheduling Locations. An assignment will be created when a new SKU-pack size arrives in the AIP system that is valid for the Delivery Group Source and one or more Scheduling Locations. An assignment will not be created for any existing source/destination combinations that already exist for the SKU-pack size's demand group

6. Click Save. You are prompted to confirm your decision.
7. Click OK.

Add a Scheduling Location for a Delivery Group

Navigate: Log into Data Management. From the Warehouse menu, select Core Data. Select the Delivery Groups tab.

1. Set a delivery group as the working delivery group.
2. Select the Scheduling Location tab.

Scheduling Location Tab

3. Select the location you want to view:
 - In the Scheduling Location field, enter the scheduling location ID.
 - Double click on the folders to expand them.

- Select the Expand All check box.
- 4. Move the locations you want to save to the Selected Scheduling Locations area.
- 5. Select a location from the Selected Scheduling Locations area.
- 6. Click **Display** to view the vehicle attributes for that scheduling location.

Define the Vehicle Attributes for a Location

1. Select the location in the Selected Scheduling Locations area.
2. Click Edit. The Edit Vehicle Attributes window opens.

Edit Vehicle Attributes Window

3. In the Effective Date field, select the first date the vehicle attributes are enabled for the location.
4. In the Vehicle Footprint field, enter the Vehicle footprint. The Vehicle Footprint must be a whole number between 1 and 99
5. In the Vehicle Height Limit field, enter the maximum height of the truck that can be accepted at the scheduling location. Vehicle height must be a decimal value between 1 and 99.99.
6. In the Vehicle Weight Limit field, enter the maximum weight of the truck that can be accepted at the scheduling location. Vehicle weight limit must be a whole number between 10 and 99999
7. In the Vehicle Minimum Drop field, enter the minimum quantity of product that can be delivered to a location. Minimum drop must be a whole number (can be zero) and must be no greater than the product of the vehicle footprint and vehicle height limit.
8. Click Apply.
9. Click Save. You are prompted to confirm your decision.
10. Click OK.

Assign the Demand Groups to a Delivery Group

Navigate: Log into Data Management. From the Warehouse menu, select Core Data. Select the Delivery Groups tab.

1. Set a delivery group as the working delivery group.
2. Select the Demand Group tab.

The screenshot shows the 'Demand Group' tab in the 'Data Management Online - Warehouse - Core Data - Delivery Groups' application. The window has a menu bar with 'Warehouse', 'Store', and 'General'. Below the menu bar are tabs for 'Demand Group Maintenance', 'Scheduling Location Maintenance', 'Ranging', and 'Delivery Groups'. The 'Demand Group Maintenance' tab is active, showing a 'Selected Delivery Group' of 'V12121200003431 - Newdlgrp5'. The 'Delivery Group Type' is 'Non-Contents' and the 'Automated Demand Group Assignment' is 'No'. The 'Tier' is '1' and the 'Delivery Group Source' is 'V1212120000 - Glassware Products Ltd.'. The 'Effective Date' is '10/10/2006'. The 'Unassigned Demand Groups' section is checked. The 'Automated Demand Group Assignment' section has radio buttons for 'Both', 'Yes', and 'No'. The 'Available Demand Groups' and 'Selected Demand Groups' sections are empty. The 'Expand All' button is visible at the bottom of each section.

Demand Group Tab

3. In the Effective Date field, select the first date the associations are valid in the system.
4. Enter or select search criteria to find demand groups:
 - **Unassigned Demand Groups:** Select the check box to search for demand groups that are not assigned to a delivery group on the effective date.
 - **Delivery Group Source:** Enter the ID of the Delivery Group Source you want to search by, or click the LOV  button and select the delivery group source. This will search for demand group assignments currently assigned to delivery groups with the selected delivery group source. The demand group assignments must match all entered search criteria, including effective date.
 - **Delivery Group:** Enter the ID of the Delivery Group you want to search by, or click the LOV  button and select the delivery group. This will search for the demand group assignments currently assigned to the selected delivery group that match all entered search criteria, including effective date.
 - **Order Source:** Enter the ID of the Order Source you want to search by, or click the LOV  button and select the order source.
 - **Scheduling Location:** Enter the ID of the Scheduling Location you want to search by, or click the LOV  button and select the scheduling location.
 - **Class:** Enter the ID of the Class you want to search by, or click the LOV  button and select the class.
 - **Demand Group:** Enter the ID of the Demand Group you want to search by, or click the LOV  button and select the demand group.

- **Automated Demand Group Assignment:** Select the option to limit or expand the search results displayed.
 - **Both:** Returns all matching search results regardless of whether they are assigned to a delivery group with automated demand group assignments enabled or disabled.
 - **Yes:** Returns only matching search results which are assigned to a delivery group with automated demand group assignment enabled.
 - **No:** Returns only matching search results which are assigned to a delivery group with automated demand group assignment disabled.
- 5. Click Search.
- 6. Move the demand group you want to assign to the delivery group to the Selected Demand Groups area.

Note: The demand group you select must be associated with the scheduling locations assigned to the delivery group.

- 7. Click Save. You are prompted to confirm your decision.
- 8. Click OK.

Maintain Delivery Groups

After you have created the delivery group you must maintain several attributes to ensure the delivery group has all the information required.

Preferences

Preferences allow you to define the time that vehicles can deliver to the warehouse. The preference hours selected indicate the desired delivery times that trucks will arrive at the destination location. Up to three preferences can be specified for any continuous number of vehicles up to ten.

Patterns

Patterns allow you define the delivery patterns for a delivery group at a location. The patterns indicate which days the warehouse chamber is able to receive items from the source.

Outbound Capacity

Outbound capacity allows you to define the number of vehicles that the source building the trucks can process. Total outbound capacity is the number of vehicle deliveries the working delivery group can make on any given day.

Pallet Settings

Pallet settings allow you to define the height and width of the pallets. The pallet height indicator determines whether the pallet height should be taken into consideration when load building trucks. The pallet weight setting indicates whether the pallet weight should be taken into consideration when load building trucks. Pallet settings are indicators used when Warehouse Inbound Planning builds trucks for delivery.

Keep Together Groups

Keep together groups allow you to select the suppliers that should have all their products, within multiple demand groups, delivered together on a truck for a location.

Set a Delivery Group as the Working Delivery Group

Navigate: Log into Data Management. From the Warehouse menu, select Core Data. Select the Delivery Groups tab.

Delivery Groups Tab

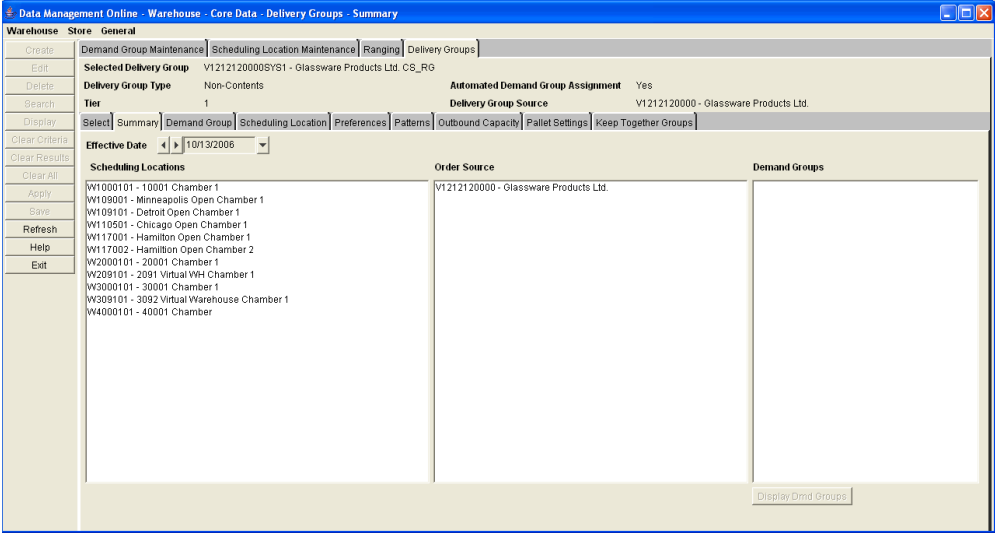
1. In the Effective Date field, select the date your search criteria is effective for the delivery group you are searching for.
2. Enter additional criteria to retrieve a delivery group.
 - Scheduling Location: Enter the scheduling location ID or click the LOV  button and select the scheduling location, to limit the search results to delivery groups that deliver to the selected scheduling locations.
 - Order Source: Enter the supplier or warehouse ID or click the LOV  button and select supplier or warehouse to limit the search results to delivery groups that deliver a product from the specified source.
 - Demand Group: Enter the demand group ID or click the LOV  button and select the demand group to limit the search results to those that deliver products assigned to the demand group.

- **Delivery Group:** Enter the delivery group ID or click the LOV  button and select delivery group.
 - **Automated Demand Group Assignment:** Select an option to limit or expand the search results displayed.
 - **Both:** Returns all matching delivery groups regardless of whether automated demand group assignment is enabled or disabled for the delivery group.
 - **Yes:** Returns only matching delivery groups which have automated demand group assignment enabled.
 - **No:** Returns only matching delivery groups which have automated demand group assignment disabled.
3. Click **Search**.
 4. In the **Delivery Group** area, select a delivery group.
 5. Click **Set as Working Delivery Group**.

View a Delivery Group Summary

Navigate: Log into Data Management. From the Warehouse menu, select Core Data. Select the Delivery Groups tab.

1. Set a delivery group as a working delivery group.
2. Select the Summary tab.



Delivery Groups - Summary Tab

3. In the **Effective Date** field, select the date you want to view a summary.
4. Select a how you want to view the demand groups associated to the working delivery group:
 - Select an order source to limit the list of scheduling locations to those that are linked through the demand group assignments to the working delivery group.
 - Select a scheduling location to limit the order source list to those that are linked to the selected location through the demand group assignments that are assigned to the working delivery group.
 - If you want to change the view, click **Refresh** and select the appropriate view option described above.

- To view the demand groups associated with the delivery groups, click **Display Dmd Groups**.

Maintain the Preferences for a Delivery Group and Scheduling Location

Navigate: Log into Data Management. From the Warehouse menu, select Core Data. Select the Delivery Groups tab.

- Set a delivery group as the working delivery group.
- Select the Preferences tab.

Preferences Tab

- In the Effective Date field, select the first date the associations are valid in the system.
- Move the scheduling locations you want to update to the Selected Locations Area.
- Click Display.
- In the Model From area, select the how you want to assign preferences.

Note: Day exceptions are enabled only if exceptions exist.

- In the Apply To area, select what you want to assign to the selected scheduling locations:
 - Day-of-week default:** Multiple days of week may be selected. Select the Delete Any Exceptions check box to clear exceptions to clear any exceptions that may exist.
 - Delete day-of-week default:** Multiple days of week may be selected. Select the Delete Any Exceptions check box to clear exceptions to clear any exceptions that may exist.
 - Exception Date:** In the To date field, select the last date the exception is valid.
 - Delete Exceptions:** In the To date field, select the last date to clear exceptions.

8. Select preferences to set on the selected scheduling locations for the selected option:
 - **Final Preference:** A final preference is used to set the preferences for all vehicles. Rather than repeat the same preference hours selections multiple times for multiple vehicles you can set the final preference value. The final preference hours will then be applied to all vehicles.
 - Select All to choose all hours in the Final Preference Hours.
 - Select Hours to enable the Final Preference Hours area. Select the desired hours.
 - Select Do Not Schedule to indicate that no deliveries are desired.
 - Select a receiving window to choose the hours assigned to the receiving window.
 - **Final Preference Hours:** Selections in the hour boxes will be based on the selection in the final preference dropdown. Selections may only be changed if Hours has been selected.
 - **Stockless Preference:** The Stockless preferences apply to products that are identified as stockless. When the vehicle contains stockless products the vehicle scheduling follows the stockless preference hours when they are defined. If no stockless preferences are defined, the normal vehicle preferences will apply.
 - Select All to choose all hours in the Stockless Hours.
 - Select Hours to enable the Stockless Hours area. Select the desired hours.
 - Select Do Not Schedule to indicate that no deliveries are desired.
 - Select a receiving window to choose the hours assigned to the receiving window.
 - **Stockless Hours:** Selections in the hour boxes will be based on the selection in the final preference dropdown. Selections may only be changed if Hours has been selected from the Stockless Preference list.
 - **Receiving Hours:** These selections may never be changed. The hour boxes are selected based on slots that exist for the displayed scheduling location.
9. Select vehicle preferences in the bottom grid. The following limitations apply:
 - Double-click an hour box to create or edit a fixed booking. This may only be done in the first row for a vehicle number, and must be greater than or equal to one and less than or equal to the vehicle number.
 - Fixed bookings for a given vehicle number may not exceed the vehicle number in total.
 - Single-click an hour box to enter or clear a preference.
 - A lower preference must exist before a higher preference can be added.
 - Preferences for a lower vehicle number must exist before preferences can be added for a higher vehicle number.
 - All preferences for a lower vehicle number cannot be deleted if preferences exist for a higher vehicle number.
 - All lower preferences cannot be deleted if a higher preference exists.
 - A given hour can only be selected once within a given vehicle number.
10. Click Save. You are prompted to confirm you decision.
11. Click **OK**.

Change the Pattern for Delivery Group to a Specified Scheduling Location

Navigate: Log into Data Management. From the Warehouse menu, select Core Data. Select the Delivery Groups tab.

1. Set a delivery group as the working delivery group.
2. Select the Patterns tab.

Patterns Tab

3. In the Effective Date field, select the first date the associations are valid in the system.
4. Move the scheduling locations you want to update to the Selected Scheduling Locations area.

Maintain the Day of the Week Delivery Pattern

1. Select the DoW Defaults option.
2. To update the delivery pattern:
 - a. Select the Update Delivery Pattern check box.
 - b. Double click on the day of week field.
 - Enter Y to indicate that deliveries can be accepted on that day of the week.
 - Enter N to indicate that deliveries cannot be accepted on that day of the week.
 - c. Select the Delete Existing Exceptions check box to clear any existing exceptions for the delivery pattern from the effective date onward.
3. To update the transportation lead times:
 - a. Select the Update Transport Lead Time option.
 - b. Double clicking the desired day of week field.

- c. Enter the Transport Lead Time, which must be a whole number between 0 and 365, which represent days.
 - d. Select the Delete Existing Exceptions option to clear existing exceptions for the transport lead times from the effective date onward.
4. Click Save. You are prompted to confirm your decision.
5. Click OK.

Maintain Day of the Week Exceptions

1. Select the Date Exceptions option.
2. To update delivery pattern exceptions:
 - a. Select the Create Delivery Pattern Exception option.
 - b. In the From and To fields, select the dates the exceptions are effective.
 - c. In the Delivery Pattern field:
 - Enter Y to indicate that deliveries can be accepted on that day of the week.
 - Enter N to indicate that deliveries cannot be accepted on that day of the week.
3. To update the transportation lead time exceptions:
 - a. Select the Create Lead Time Exception option.
 - b. In the From and To fields, select the dates the exceptions are effective.
 - c. In the Transport Lead Time field, enter a lead time value, which must be a whole number between 0 and 365, which represent days.
4. Click Save. You are prompted to confirm your decision.
5. Click OK.

Delete Delivery Pattern Exceptions

1. Select the Delete Exceptions option.
2. To remove delivery date exceptions:
 - a. Select the Delete Delivery Pattern Exceptions check box.
 - b. In the From and To fields, select the date range that contains the exceptions you want to remove.
3. To remove the transportation lead time exceptions:
 - a. Select the Delete Lead Time Exceptions option.
 - b. In the From and To fields, select the date range that contains the exceptions you want to remove.
4. Click **Save**. You are prompted to confirm your decision.
5. Click OK.

Maintain Outbound Capacity Settings for a Delivery Group

Navigate: Log into Data Management. From the Warehouse menu, select Core Data. Select the Delivery Groups tab.

1. Set a delivery group as the working delivery group.
2. Select the Outbound Capacity tab.

Data Management Online - Warehouse - Core Data - Delivery Groups - Outbound Capacity

Warehouse Store General

Selected Delivery Group: 0000000041 - Bicester Romeo

Delivery Group Type: Contents

Tier: 1

Automated Demand Group Assignment: No

Delivery Group Source: W1350 - Staines

Effective Date: 09/20/2005

Current Capacities

Sep	T	W	T	F	S	S	M	T	W	T	F	S	S	Oct
20	21	22	23	24	25	26	27	28	29	30	1	2	3	

Vehicle Number

DoW Defaults

Effective Date: 09/20/2005

Vehicle Number

☐ Delete existing exceptions.

Date Exceptions

Vehicle Number Exception From: 09/20/2005 to: 09/20/2005 Vehicle Number

Delete Exceptions

Effective Date Range From: 09/20/2005 to: 09/20/2005

Outbound Capacity Tab

3. In the Effective Date field, select the first date the associations are valid in the system.
4. To create a day of the week (DoW) default, select DoW Defaults option:
 - a. Double click in the Vehicle Number cells below the days of the week.
 - b. Enter the number of vehicles that can be built for the delivery group from each source.
5. To create Date Exceptions, select the Date Exceptions option:
 - a. In the From and To fields, select the date range for the exception.
 - b. Enter the number of vehicles that can be built for the delivery group from each source. The number of vehicles must be a value greater than 0 and less than 1000.
6. To delete exceptions, select the Delete Exceptions option:
 - In the From and To fields, select the date range of exceptions to be deleted.
7. Click Save. You are prompted to confirm your decision.
8. Click **OK**.

Maintain the Pallet Settings for a Delivery Group/Scheduling Location

Navigate: Log into Data Management. From the Warehouse menu, select Core Data. Select the Delivery Groups tab.

1. Set a delivery group as the working delivery group.
2. Select the Pallet Settings tab.

Pallet Settings Tab

3. Move the scheduling locations you want to update to the Selected Scheduling Locations area.
4. Select the Use Pallet Height check box to take pallet height into consideration for the working delivery group at the selected scheduling locations when building trucks.
5. Select the Use Pallet Weight check box to take pallet weight into consideration for the working delivery group at the selected scheduling locations.
6. Click Save. You are prompted to confirm your decision.
7. Click OK.

Maintain Keep Together Groups for a Delivery Group and Scheduling Location

Navigate: Log into Data Management. From the Warehouse menu, select Core Data. Select the Delivery Groups tab.

1. Set a delivery group as the working delivery group
2. Select the Keep Together Groups tab.

Keep Together Groups Tab

3. Move the scheduling locations you want to update to the Selected scheduling Locations area.
4. Click Display. Suppliers and Keep Together Groups for the location appear.
5. Select the suppliers that are kept together for ordering into the location.
6. Click **Create**. The Create Keep Together Group window opens.

Create Keep Together Group Window

7. In the Keep Together Group Name field, enter the name of the keep together group.
8. Click Save. You are prompted to confirm your decision.
9. Click **OK**.

10. Click **Save** on the Keep Together Group tab. You are prompted to confirm your decision.
11. Click **OK**.

Demand Group

Maintain Demand Groups

The Demand Group Assignment window allows you to maintain the demand groups used by Data Management online to maintain ordering parameters into the warehouse. Warehouses manage store demand based on the units needed and then order based on the pack size options available. A demand group contains groups of pack-sizes of one SKU and exists for the entire company. They do not vary by location or date.

Demand groups may also contain pack-sizes of pre-priced SKUs, value-added SKUs, or discontinued SKUs, as long as the on-supply and off-supply dates do not overlap with the standard SKU. Pre-priced and value-added SKU pack-sizes may only be placed in demand groups if they are related to the standard SKU. All SKU pack-sizes in a demand group must be from the same class and SKU type. The following table provides an example of a demand group.

Item	Pack-size	Characteristics
Item 1	16 cases	Standard SKU
Item 1	12 cases	Standard SKU
Item 1	4 cases	Standard SKU
Item 2	10 cases	Pre-priced SKU

In the above example, all SKU/pack sizes are considered during replenishment.

Demand groups are created through a batch process for new SKUs. Each demand group is created with a unique code based on the primary SKU number plus a letter. The name of the demand group is based on the primary SKU description. You can choose to edit the name for the demand group as necessary.

If a demand group no longer contains any SKU pack sizes, it is deleted when you save your changes.

The From Demand Groups tree and To Demand Groups tree can be cleared individually if there are no unsaved changes on the screen. If the screen contains unsaved changes:

- the trees must either be cleared together
- the changes must be saved before continuing

Search for Demand Groups

Navigate: Log into Data Management. From the Warehouse menu, select Core Data. On the Demand Group Maintenance primary tab, select the Demand Group Assignment secondary tab.

The screenshot shows the 'Data Management Online - Warehouse - Core Data' window. The 'Demand Group Assignment' tab is active. On the left, there are buttons for 'Create', 'Edit', 'Delete', 'Search', 'Display', 'Clear Criteria', 'Clear Results', 'Clear All', 'Apply', 'Save', 'Refresh', 'Help', and 'Exit'. The main area is divided into 'From Search' and 'To Search' sections. Below these are two lists of demand groups: 'From Demand Groups' and 'To Demand Groups'. The 'From Demand Groups' list includes items like '100004001 - Organic Ready Salted Crisps', '10001900S - Extra Large Socks', '10003000Z - Frozen Peas', '00100030 - Frozen Peas', '00100031 - 16', '10007400B - Sainsbury's Nappies', '10009300O - Juicy BBQ Charcoal', '10009500P - Char Grilled Salmon Steaks', '10010700W - Frozen Sausages', '10011900E - Frozen Beef Burgers', '10013100O - Fried Muesli', '10017000P - Budget Baby Food', '10020300L - Fried Mash Potato', '10022100Y - Organic Olive Oil', '10025900A - Juicy Pasta Sauce', '10026400D - Sainsbury's Lettuce', '10027900N - Spicy Hot Pasta Sauce', '10030900I - Tinned Light Bulbs', '10034900L - Frozen Sausages', '10036100U - Super Size Baby Food', '10036200V - Char Grilled Baby Food', '10036700Z - Frozen Sausages', '10039600T - Char Grilled Grapes', '10040700A - Tinned Carrots', '10042100I - Reconstituted Broccoli', '10049200E - Extra Large Red Peppers', '10052900D - Extra Large Nappies', '10053900L - Tinned Bananas', '10054200N - Extra Large Pasta Spirals', '10054700O - Extra Large Cabbage', '10055600V - Juicy Potatoes', '10056200Z - Budget Tomato Soup', '10056500B - Fried Mushrooms', and '10056800D - Sainsbury's Green Peppers'. The 'To Demand Groups' list includes items like '10002600W - Frozen Chicken Breasts', '10007200Z - Char Grilled Chilli Peppers', '10007500C - Super Size Pasta Sauce', '10017700U - Frozen Sausages', '00100177 - Frozen Sausages', '00100178 - Frozen Sausages', '10019700H - Reconstituted Bananas', '10022200Z - Organic Bananas', '10022600C - Tinned Muesli', '10027400K - Organic Runner Beans', '10029100W - Char Grilled Lard', '10031100J - Tinned Cheddar Cheese', '10031200K - Char Grilled Beef Jerky', '10036400W - Fresh Runner Beans', '10036500X - Reconstituted Onions', '10037400E - Char Grilled Red Peppers', '10038600N - Char Grilled Light Bulbs', '10041800G - Organic Beef Jerky', '10042000H - Frozen Beef Burgers', '10045200E - Frozen Sausages', '10046500N - Fresh Cheese Sandwich', '10055000S - Char Grilled Dog Food', '10057100F - Fried Red Peppers', '10058100N - Reconstituted Potatoes', '10058700O - Juicy Cauliflower', '10063800W - Sainsbury's T-Shirts', '10064600B - Fresh Hot Chocolate', '10066600O - Juicy Bananas', '10070200N - Sainsbury's Chocolate Cake', '10072500C - Fresh Oranges', '10072800E - Juicy Ready Salted Crisps', and '10073000F - Juicy Olive Oil'.

Demand Group Assignment Tab

1. Check the From Search and or To Search check box.
2. Enter additional criteria to retrieve demand groups. You must select at least one criterion for the search.
 - **Class:** Enter the class ID, or click the LOV  button and select a class.
 - **SKU:** Enter the SKU ID, or click the LOV  button and select a SKU.
 - **Demand Group:** Enter the demand group ID or click the LOV  button and select a demand group.
3. Click Search.

Move SKU Pack Sizes between Demand Groups

Navigate: Log into Data Management. From the Warehouse menu, select Core Data. On the Demand Group Maintenance primary tab, select the Demand Group Assignment secondary tab.

1. Search for the From and To demand groups you want to update.
2. In the From Demand Groups tree, expand the demand group you want to remove SKU pack-sizes from.
 - Double-click the demand group and SKU folders.
 - Select the Expand All option for the From Demand Groups tree.
3. Select the SKU pack-sizes you want to move by doing one of the following:
 - Select an individual SKU pack-size by clicking on the SKU pack-size.
 - Select multiple SKU pack sizes by pressing the CTRL key and clicking on each SKU pack-size.
 - Select all pack sizes for a given SKU by clicking on the SKU or its folder icon in the From Demand Groups tree.

Note: When the global inventory tracking flag is set to a value of "Eaches", you can only select a SKU folder.

In any case, regardless of the inventory tracking flag, if you select a standard SKU folder, any pre-priced or value-added SKU-pack sizes that are related to the standard SKU will also be moved.

4. Click the move right  button to move the SKU pack sizes to the selected demand group.
5. Click Save. You are prompted to confirm your decision.
6. Click **OK**.

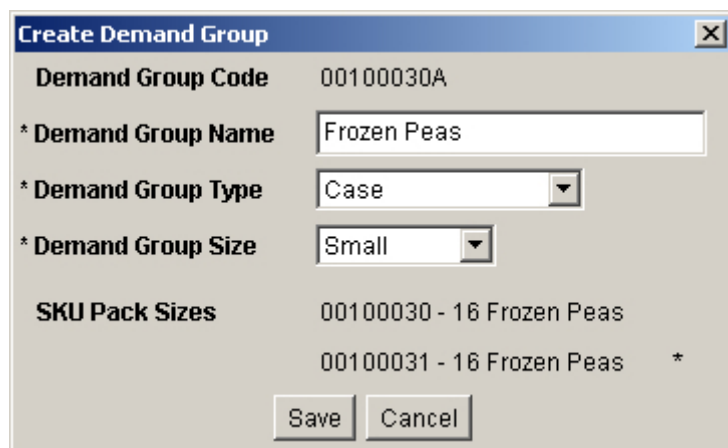
Create a New Demand Group

Navigate: Log into Data Management. From the Warehouse menu, select Core Data. On the Demand Group Maintenance primary tab, select the Demand Group Assignment secondary tab.

1. Search for the From demand groups you want to create a new demand group for.
2. Select one or more pack-sizes for a given SKU.

Note: If you select a standard SKU folder, any pre-priced/value-added SKU pack sizes that are related to the standard SKU are also added to the new demand group.

3. Click **Create**. The Create Demand Group window opens.



Create Demand Group

Demand Group Code: 00100030A

* Demand Group Name: Frozen Peas

* Demand Group Type: Case

* Demand Group Size: Small

SKU Pack Sizes: 00100030 - 16 Frozen Peas
00100031 - 16 Frozen Peas *

Save Cancel

Create Demand Group Window

- a. In the Demand Group Name field, update the name of the new demand group, as necessary

Note: By default, a demand group is named after its standard SKU.

- b. In the Demand Group Type field, select how SKUs are ordered.
- c. In the Demand Group Size field, select the size of the demand group.
- d. Click Save. You are prompted to confirm your decision.
- e. Click OK.

Edit a Demand Group

Navigate: Log into Data Management. From the Warehouse menu, select Core Data. On the Demand Group Maintenance primary tab, select the Demand Group Assignment secondary tab.

1. Search for the From and To demand groups you want to update.
2. Select the demand group you want to edit.
3. Click Edit. The Edit Demand Group window opens.



Edit Demand Group

Demand Group Code: 10001900S

* Demand Group Name: Extra Large Socks

* Demand Group Type: Merchandising Unit

* Demand Group Size: Extra Large

SKU Pack Sizes: 00100019 - 18 Extra Large Socks

Save Cancel

Edit Demand Group Window

- a. Edit the demand group properties you wish to change.
 - In the Demand Group Name field, enter a new name for the demand group.
 - In the Demand Group Type field, select Case or Merchandising Unit.
 - In the Demand Group Size field, select Small, Medium, Large, or Extra Large.
- b. Click **Save**. You are prompted to confirm your decision.
- c. Click **OK**.

Maintain Demand Group Attributes

The Demand Group Attributes window allows you to select a SKU, view the demand groups that contain the SKU, and then maintain the size and type attributes for each one. Attributes determine whether pack-sizes of the same SKU across multiple demand groups can be used as substitutes for each other during the reconciliation process.

Maintain Demand Group Attributes

Navigate: Log into Data Management. From the Warehouse menu, select Core Data. On the Demand Group Maintenance primary tab, select the Demand Group Assignment secondary tab.

1. Click on the Demand Group Attributes tab.

Demand Group Attributes Tab

2. In the Class field, enter the class ID or click the LOV  button and select a class.
3. In the SKU field, enter the SKU ID or click the LOV  button and select a SKU.
4. Click Search.

5. To change the demand group attributes:
 - a. Select the demand group you want to edit.
 - b. In the Type field, select the appropriate demand group type.
 - c. In the Size field, select the appropriate demand group size.
6. Click Save. You are prompted to confirm your decision.
7. Click **OK**.

Ranging

Range Locations by SKU

The Ranging window allows you to maintain the ranging status of a SKU-pack size. Ranging allows you to associate a location and a SKU-pack size. You can maintain the ranging associations by SKU or by warehouse.

SKU packs that are ranged can exist in multiple statuses:

- **Profile Ranged:** Indicates that the system has automatically ranged the SKU pack at the warehouse when the SKU or warehouse was assigned to the same profile.
- **Exception Ranged:** Indicates that the user has manually ranged the SKU pack at the warehouse rather than having ranged it by assigning the SKU pack to a warehouse profile (Profile Ranged). SKU packs that are Exception Ranged are used throughout the system in exactly the same manner as Profile Ranged SKU packs.
- **Pending De-ranged:** Indicates that the SKU pack is no longer replenished at the warehouse. The SKU pack can be ordered out of the warehouse in order to remove the stock. Once all of the stock at the warehouse is cleared the status is automatically updated to De-ranged.
- **De-ranged:** The SKU pack is no longer replenished or stocked at the warehouse.

Maintain Ranging for a SKU by Pack-Size

Navigate: Log into Data Management. From the Warehouse menu, select Core Data. On the Ranging primary tab, select the Ranging by SKU Pack Size secondary tab.

Data Management Online - Warehouse - Core Data - Demand Group Attributes - Ranging

Warehouse Store General

Demand Group Maintenance Scheduling Location Maintenance **Ranging** Delivery Groups

Ranging by SKU Pack Size Ranging by Warehouse

Class None

* SKU None

☒ View All ☐ Ranged ☐ Not Ranged

SKU Pack Size Discontinued Date

Selected SKU Pack Size None

Tier ☒ View linked only ☐ View All

Warehouse Current Status New Status

Exception Range All Pending De-range All Reset All

Ranging By SKU Pack Size Tab

- Enter criteria to retrieve SKUs:
 - Class:** Enter the class ID, or click the LOV button and select a class.
 - SKU:** Enter the SKU ID, or click the LOV button and select a SKU.
- Click **Search**.
 - To view all pack sizes that match the search criteria, select View All.
 - To view only SKU-pack sizes that are ranged to at least one warehouse, select Ranged.
 - To view only SKU-pack sizes that are not ranged to any warehouse, select Not Ranged.

3. Select the SKU-pack size you want to change.
4. Click **Display**.
 - To view only warehouses that the selected SKU pack size is ranged to, select View Linked Only.
 - To view all valid warehouses, select View All.
5. Select a new ranging status for one or more warehouses:
 - In the New Status column, select a ranging status for each warehouse you want to change.
 - Click Exception Range All to set all displayed warehouses to Exception Ranged status. This will only update warehouses where the exception ranged status is valid; the status of other warehouses will remain unchanged.
 - Click Pending De-range All to set all displayed warehouses to Pending De-ranged status. This will only update warehouses where the pending de-ranged status is valid; the status of other warehouses will remain unchanged.
 - Click Reset **All** to reset all displayed warehouses back to their saved status at any time.
6. Click Save. You are prompted to confirm your decision.
7. Click **OK**.

Range Locations by Warehouse

The Ranging window allows you to maintain the ranging status of a SKU-pack size. Ranging allows you to associate a location and a SKU-pack size. You can maintain the ranging associations by SKU or by warehouse.

Edit the Ranging Status of One or More SKU Pack Sizes at a Selected Warehouse

Navigate: Log into Data Management. From the Warehouse menu, select Core Data. On the Ranging primary tab, select the Ranging by Warehouse secondary tab.

Ranging By Warehouse Tab

1. Enter criteria to retrieve SKUs:
 - Warehouse: Enter the warehouse ID, or click the LOV  button and select a warehouse.
 - Class: Enter the class ID, or click the LOV  button and select a class.
 - SKU: Enter the SKU ID, or click the LOV  button and select a SKU.
2. Click Search.
3. Select the SKU-pack size you want to change.
4. Click Display.
 - To view only warehouses that the selected SKU pack size is ranged to, select View Linked Only.
 - To view all valid warehouses, select View All.
5. Select a new ranging status for one or more SKU pack sizes:
 - In the New Status column, select a ranging status for each SKU pack size you want to change.

- Click Exception **Range All** to set all displayed SKU pack sizes to Exception Ranged status. This will only update SKU pack sizes where the exception ranged status is valid; the status of other SKU pack sizes will remain unchanged..
 - Click Pending De-range All to set all displayed SKU pack sizes to Pending De-ranged status. This will only update SKU pack sizes where the pending de-ranged status is valid; the status of other SKU pack sizes will remain unchanged.
 - Click Reset **All** to reset all displayed SKU pack sizes back to their saved status at any time.
6. Click Save. You are prompted to confirm your decision.
 7. Click **OK**.

Scheduling Location Maintenance

Create Chambers

Warehouses are imported from an external merchandising system and assigned chambers in Data Management online. A warehouse is a collection of chambers at a warehouse. Each chamber represents an area of the warehouse. You can define a code and name, status, capacity type, and specific flags for each chamber.

Capacity Type

The capacity type allows you to indicate how the items are being stored in each chamber.

Flags

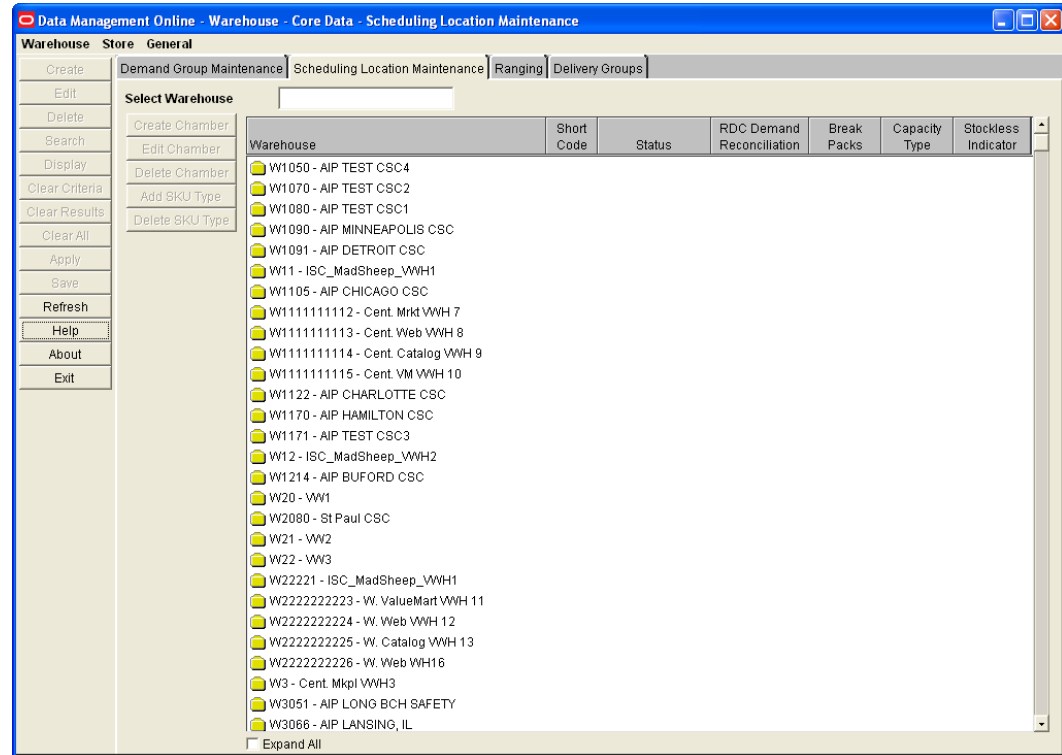
There are two types of flags associated with a chamber.

- **Break Packs Flag:** The Break Packs flag indicates that the warehouse can break packs; leaving this flag blank indicates that the warehouse cannot break packs..
- **Reconciliation Flag:** When selected the Reconciliation Flag indicates that any store orders are reconciled with the quantities available at the chamber. For example, if the store demand is for 5 cases of SKU pack size 10, and the warehouse only has SKU pack size 15, the warehouse orders are reconciled against the store orders so that the store can get some quantity of the required SKU.

After you define the chamber for a warehouse, you must add SKU types to the chamber. All SKUs with the SKU type are delivered to that chamber. You can associate a SKU type to one chamber of a warehouse at a time. When you add a SKU type to a chamber, any previous association of that SKU type is removed from any other chambers of the same warehouse.

Search for a Warehouse and Chamber

Navigate: Log on to Data Management. From the Warehouse menu, select Core Data. Select the Scheduling Location Maintenance tab.



Scheduling Location Maintenance Tab

1. In the Select Warehouse field, type part or all of the warehouse code.
2. Press Enter.
3. The first warehouse code that matches the entry will be selected and visible in the tree.

Create a Chamber

Navigate: Log on to Data Management. From the Warehouse menu, select Core Data. Select the Scheduling Location Maintenance tab.

Note: Chambers must not be created for warehouses with a pending sister warehouse copy. Creating chambers before the copy occurs will cause the copy to fail. The supply chain must then be completed manually.

1. Select the warehouse to create the chamber for by clicking on its name or folder icon in the tree.
2. Click **Create Chamber**. The Create Chamber window opens.



Create Chamber

Warehouse	W11 - ISC_MadSheep_VWH1
Chamber Code	01
* Chamber Name	
* Short Code	
* Capacity Type	Boards
* Break Packs	☐
* Reconciliation Flag	☒

Save Cancel

Create Chamber Window

3. In the Chamber Name field, enter a name for the chamber.
4. In the Short Code text field, enter a short code for the chamber.

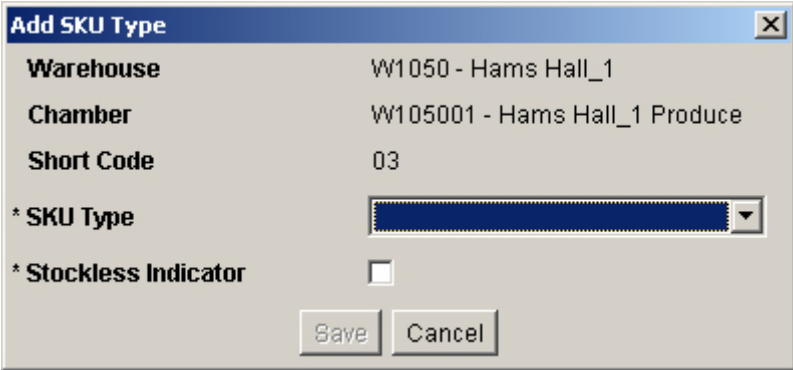
Note: Short codes must be unique across all scheduling locations and consists of 2 alphanumeric characters.

5. In the Capacity Type field, select the receiving/storage unit of items in the chamber.
6. Select the Break Packs check box if the chamber can break packs.
7. Check the Reconciliation Flag checkbox if store orders should be reconciled for the chamber.
8. Click Save. You are prompted to confirm your decision.
9. Click OK.

Add SKU Type to a Chamber

Navigate: Log on to Data Management. From the Warehouse menu, select Core Data. Select the Scheduling Location Maintenance tab.

1. Expand the warehouse that contains the chamber you wish to add a SKU type to by double-clicking on the warehouse or checking the Expand All checkbox.
2. Select the chamber to add a SKU type to by clicking on its name or folder icon.
3. Click Add **SKU Type**. The Add SKU Type window opens.



Add SKU Type

Warehouse	W1050 - Hams Hall_1
Chamber	W105001 - Hams Hall_1 Produce
Short Code	03
* SKU Type	
* Stockless Indicator	☐

Save Cancel

Add SKU Type Window

4. In the SKU Type field, select the SKU type you want to add to the chamber.
5. In the Stockless Indicator field:

- Select the check box to indicate that SKUs are not stored in the warehouse from day to day.
 - Clear the check box to indicate that surplus SKUs can be stored in the warehouse from day to day.
6. Click Save. You are prompted to confirm your decision.
 7. Click OK.
 8. Change the status of the chamber as necessary.

Maintain Chambers

Warehouses are imported from an external merchandising system and then assigned chambers in Data Management online.

In the warehouse structure, warehouses are displayed on highest level. Beneath the warehouse are the chambers of the warehouse. For each chamber, the short code, status, capacity type, break packs flag, reconciliation flag, and stockless indicator are displayed next to it in the tree. The SKU types supported by each warehouse chamber are displayed with file icons beneath their warehouse chamber folder.

Status

The chamber may exist in one of multiple statuses. A status tells you whether a chamber can be used for replenishment. You may change the status of a chamber forward or backward one status at a time before saving. You cannot change the status of a chamber from New to warehouse replenishment (WRP) unless the chamber has at least one SKU type associated to it.

- **New:** The chamber is being created and cannot be used.
- **WRP:** The chamber is used to generate replenishment planning numbers for the warehouse, but not for warehouse inbound planning.
- **WIP:** The chamber is used to generate replenishment planning numbers for the warehouse, uses the numbers for inbound planning at the warehouse, the generated orders are not executed or communicated to the merchandising system.
- **Release:** The chamber is used in the system to generate replenishment planning numbers for the warehouse, uses the numbers for inbound planning at the warehouse and release purchase orders to the merchandising system.
- **Closing Down:** The inventory in the chamber is sold and not replenished.
- **Closed:** The chamber is no longer used in the system, and has not been deleted. A chamber can be closed only if the chamber has no confirmed or future orders for the entire planning horizon, the chamber's warehouse is not ranged for any SKUs, and there are no actively ranged SKUs on order from a store being sourced from the chamber's warehouse. When a chamber is closed all SKU types are removed from it.

Maintaining Chamber

A chamber must have a closed status before it can be deleted. When you delete a chamber it is removed from any delivery groups or order groups to which it is assigned.

SKU Types

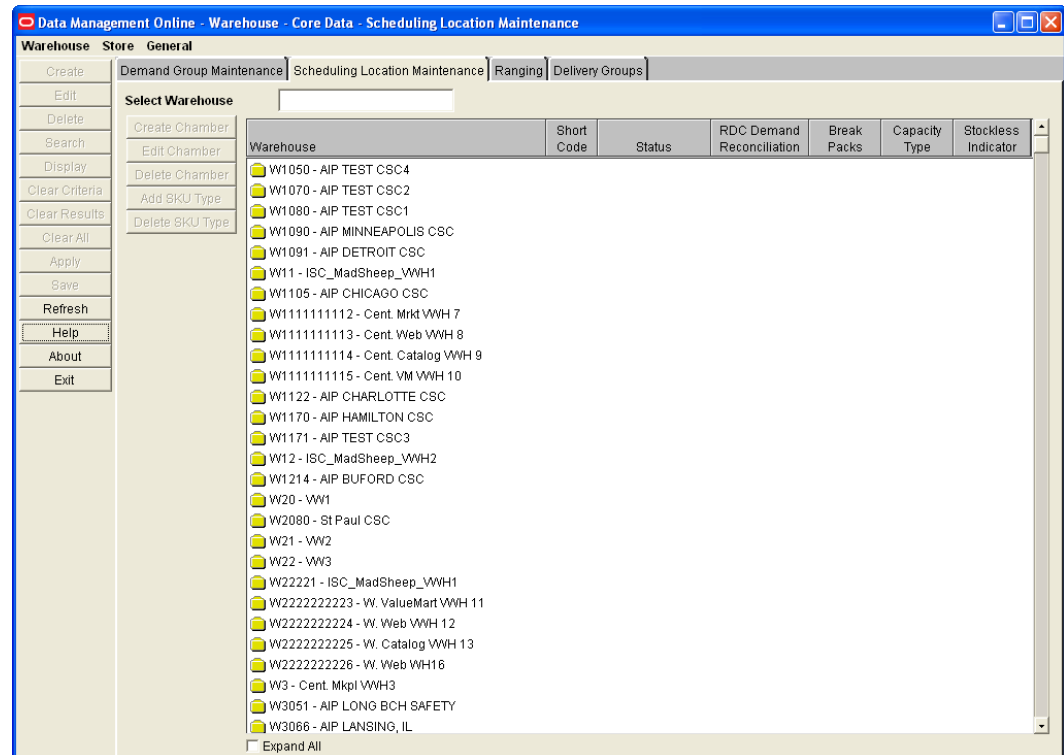
When a chamber is in WRP, WIP, Release, or Closing down status, there must be at least one SKU type remaining in order to delete a SKU type.

You can delete the last SKU type from a chamber only if the chamber status is New. You may add a SKU type to any warehouse chamber as long as its status is not Closed. Once you close the chamber any remaining SKU types are automatically removed.

To move a SKU type between chambers, the chamber status you are moving the SKU type from must be New.

Search for a Warehouse and Chamber

Navigate: Log on to Data Management. From the Warehouse menu, select Core Data. Select the Scheduling Location Maintenance tab.



Scheduling Location Tab

1. In the Select Warehouse field, enter part or all of the warehouse code that contains the chamber you want to edit.
2. Press **Enter**. The first warehouse code that matches the entry is selected.

Edit a Chamber

Navigate: Log on to Data Management. From the Warehouse menu, select Core Data. Select the Scheduling Location Maintenance tab.

1. Search for a warehouse.
2. Select the chamber you want to update.
3. To update the name and the code of the chamber.
 - a. Click **Edit Chamber**. The Edit Chamber window opens.

Warehouse	W1200 - Milton Keynes
Chamber Code	W0008
* Chamber Name	Milton Keynes Ambient
* Short Code	08

Save Cancel

Edit Chamber Window

- b. Edit the enabled fields as necessary.
- c. Click Save. You are prompted to confirm your decision.
- d. Click OK.

Change the Status of a Chamber

- Select a chamber status from the Status option. Chamber status changes are assigned in the flowing order:
 - New
 - WRP
 - WIP
 - Released
- To set the chamber status to Release, you must change and save the status as follows:
 - If the status displays New, select WRP from the Status option and click Save.
 - If the status displays WRP, select WIP from the Status option and click Save.
 - If the status displays WIP, select Release from the Status option and click Save.

Change the Reconciliation Flag for a Warehouse Chamber

- Select the Reconciliation Flag check box to indicate that store orders are reconciled for the chamber.
- Clear the Reconciliation Flag check box to indicate that store orders are not reconciled for the chamber.

Change the Break Packs Flag for a Warehouse Chamber

- Select the Break Packs check box if the chamber can break packs.
- Clear the Break Packs checkbox if the chamber cannot break packs.

Change the Capacity Type of a Chamber

- Select a new capacity type from the Capacity Type dropdown for the chamber.

Change the Stockless Indicator for a SKU Type

- Select the Stockless Indicator option if all surplus SKUs are immediately allocated out of the warehouse.
- Clear the Stockless Indicator option if the SKUs can be stored in the warehouse from day to day.

4. Click **Save**. You are prompted to confirm your decision.
5. Click **OK**.

Delete a SKU Type from a Chamber

Navigate: Log on to Data Management. From the Warehouse menu, select Core Data. Select the Scheduling Location Maintenance tab.

1. Search for a warehouse.
2. Select the SKU type to delete by clicking on its name or file icon.
3. Click Delete **SKU Type**. You are prompted to confirm your decision.

Note: When a chamber is in WRP, WIP, Release, or Closing Down status, the Delete SKU Type button is enabled if the chamber contains more than one SKU type. You can delete the last SKU type from a chamber only if the status of the chamber is New.

4. Click **OK**.

Delete a Chamber

Navigate: Log on to Data Management. From the Warehouse menu, select Core Data. Select the Scheduling Location Maintenance tab.

1. Search for a warehouse.
2. Delete all SKU types from the chamber.
3. Select the chamber you want to delete.
4. Change the status of the chamber to closed.
5. Click Delete Chamber. You are prompted to confirm your decision.
6. Click OK.

Define Warehouse Defaults and Exceptions

Define Warehouse Defaults

Maintain Coupled Indicators for a Warehouse

The Warehouse Couple Flag window allows you to maintain coupled indicators, which allows you to join store and warehouse orders for selected SKUs. When the store orders are coupled with the warehouse orders, the store order cannot be re-planned once the store placement lead time has been reached. The placement lead time subtracted from the delivery date results in a date after which the warehouse order may not be able to be re-planned to reflect any new quantity required to fulfill the store's demand. You can update a SKUs coupled flag for a given warehouse-chamber on the effective date through this window

Maintain the Status of a Warehouse Coupled Flag for a SKU

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Data. On the Warehouse Product Defaults & Exceptions primary tab, select the Warehouse Coupled Flag secondary tab.

The screenshot shows the 'Warehouse Coupled Flag' tab in the 'Warehouse Product Defaults & Exceptions' section. The 'Effective Date' is set to 10/26/2006. The 'Warehouse Chamber' is W109001 - Minneapolis1, the 'Class' is 66_214 - GRAPHING CALCULATORS, and the 'SKU' is None. A list of 'Available SKUs' is shown with a 'Coupled' checkbox for each. The list includes SKUs like 100072001, 100044019, 100069005, etc. At the bottom, there are buttons for 'Check All', 'Uncheck All', and 'Reset All'.

Warehouse Coupled Flag Tab

1. In the Effective Date field, select the date your changes become effective.
2. Enter additional criteria to retrieve SKUs.
 - Warehouse Chamber: Enter the warehouse ID, or click the LOV  button and select a warehouse.
 - Class: Enter the class ID, or click the LOV  button and select a class.
 - SKU: Enter the SKU ID, or click the LOV  button and select a SKU.
3. Click **Search**.
 - Select the Coupled check box next to a SKU pack size to indicate that warehouse and supplier orders for the SKU are sent together.
 - Clear the Coupled check box next to a SKU pack size to indicate that warehouse and supplier orders for the SKU are not sent together.
 - Click Check All to set the coupled indicator for all available SKU pack sizes.
 - Click Uncheck All to remove the coupled indicator for all available SKU pack sizes.
 - Click Reset All to set all coupled indicators to the original values.
4. Click Save. You are prompted to confirm your decision.
5. Click OK.

Maintain Size and Volume Properties for a Location

The Pallet and Order Multiples tab allows you define and view pallet multiples and order multiples for an item.

Search for Locations

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Data. On the Warehouse Product Defaults & Exceptions primary tab, select the Pallet and Order Multiples secondary tab.

The screenshot shows the 'Pallet and Order Multiples' tab in the 'Warehouse Product Defaults & Exceptions' section. The interface includes a left-hand menu with options like Create, Edit, Delete, Search, Display, Clear Criteria, Clear Results, Clear All, Apply, Save, Refresh, Help, About, and Exit. The main area contains several sections:

- Warehouse Coupled Flag:** A dropdown menu set to '07/15/2009'.
- Unit of Measure:** Radio buttons for 'Cases' (selected) and 'Eaches'.
- Order Source, Class, and SKU Pack Size:** Each has a text input field and a 'None' button.
- Available Locations:** A large empty box for listing available locations.
- Selected Locations:** A large empty box for listing selected locations.
- Displayed Location:** A dropdown menu set to 'None'.
- Pallet Multiple by Delivery Date:** A table with columns for days of the week (Jul 15 to 25) and rows for Pallet and Order Multiples.
- Set Pallet Multiple to:** A checkbox and a text input field.
- Set Order Multiple to:** A checkbox and a text input field.

Pallet and Order Multiples Tab

1. In the Effective Date field, select the date your changes become effective.
2. Enter additional criteria to retrieve a delivery group.
 - **Order Source:** Enter the supplier ID or warehouse ID, or click the LOV  button and select a supplier or warehouse.
 - **Class:** Enter the class ID, or click the LOV  button and select a class.
 - **SKU-Pack Size:** Enter the SKU ID, or click the LOV  button and select a SKU pack size.
3. Click Search. The Available Locations that are ranged for the Supplier and SKU pack size appear.
4. Move a location from the available side to the selected side.
5. Click **Display**.

Define Pallet Multiple and Order Multiples

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Data. On the Warehouse Product Defaults & Exceptions primary tab, select the Pallet and Order Multiples secondary tab.

1. Search for a locations.
2. Select By Delivery Date.
3. To define a pallet multiple:
 - a. Select the Set Pallet Multiple To option.
 - b. In the field to the right, enter a new value. This value represents the number of cases (of the pack size) that constitute a full pallet.
4. To define an order multiple:
 - a. Select the Set Order Multiple To option.
 - b. In the field to the right, enter a new value.
5. Click Save. You are prompted to confirm your decision.
6. Click **OK**.

Define Case Weight and Stackability

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Data. On the Warehouse Product Defaults & Exceptions primary tab, select the Pallet and Order Multiples secondary tab.

1. Search for a locations.
2. Select By Batch Run Date.
3. To set a new case weight:
 - a. Select the Set Case Weight To option.
 - b. In the field to the right, enter a new value.
4. To set a new stackability value:
 - a. Select the Set Stackability To option.
 - b. In the field to the right, enter a new value. The following values may be assigned:
 - **Yes:** A Delivery Unit with stackability of Yes may have any other Delivery Unit stacked on top of it.
 - **No:** A Delivery Unit with stackability of No may not have another Delivery Unit stacked on tip of it.
 - **Same:** A Delivery Unit with stackability of Same may only have other 'Same' type Delivery Units stacked on top of it.
5. Click Save. You are prompted to confirm your decision.
6. Click **OK**.

Define Supplier/SKU-Pack Size That Are Kept Together for Ordering

The Keep Together SKU Pack Size Flag window allows you to indicate that the orders of a supplier/SKU/pack size are kept together during the vehicle loading process. Any changes that you make are effective with the next batch run.

Define Supplier/SKU-Pack Size That Are Kept Together for Ordering

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Data. Select the Keep Together SKU Pack Size Flag tab.

Keep Together SKU Pack Size Flag Tab

1. Enter search criteria to retrieve SKU-pack sizes for a supplier.
 - **Supplier:** Enter the supplier ID, or click the LOV  button and select a supplier.
 - **Class:** Enter the class ID, or click the LOV  button and select a class.
 - **SKU:** Enter the SKU ID, or click the LOV  button and select a SKU.
2. Click **Search**.
 - Select the Keep Together Flag check box next to a SKU pack size to indicate that orders are kept together during the ordering process.
 - Clear the Keep Together Flag check box next to a SKU pack size to indicate that orders are not kept together during the ordering process.
 - Click Check All to set the keep together indicator for all available SKU pack sizes.
 - Click Uncheck All to remove the keep together indicator for all available SKU pack sizes.
 - Click Reset All to set all indicators to the original values.
3. Click Save. You are prompted to confirm your decision.
4. Click **OK**.

Define Warehouse Exceptions

Define Stockless Indicator Exceptions

The Stockless Indicator Exceptions tab allows you to set exceptions to the stockless indicators at the warehouse level. The stockless indicator means that the warehouse ships all inventory out of the warehouse at the end of the day. This is typically used for perishable items.

Note: Based on the AIP configuration settings for your system, the Warehouse Type drop-down list may not appear on the Stockless Indicator exceptions tab. This field is typically displayed when warehouse types are defined in your system and displays the following options:

- CS_NT, which stands for Customer Service Center—Non-traditional
- CS_RG, which stands for Customer Service Center—Regional
- XD_GS, which stands for Cross-dock – Globally Sourced
- XD_RG, which stands for Cross-dock - Regional

Search for Stockless Exceptions

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Data. On the Warehouse Product Defaults & Exceptions primary tab, select the Stockless Indicator Exceptions secondary tab.

Stockless Indicator Exceptions Tab

1. In the Effective Date field, select the date your changes become effective.
2. Select the option for how you want to view and maintain exceptions, Demand Group or Warehouse.
3. Enter the required criteria.

- **Warehouse:** Warehouse is required when maintaining exceptions by warehouse. Enter the class ID, or click the LOV  button and select a class.

- **Class:** Enter the class ID, or click the LOV  button and select a class.
- **Demand Group:** Demand Group is required when maintaining exceptions by Demand Group. Enter the demand group ID, or click the LOV  button and select a demand group.

4. Click **Search**.

Update the Stockless Status for a SKU at the Warehouse

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Data. On the Warehouse Product Defaults & Exceptions primary tab select, the Stockless Indicator Exceptions secondary tab.

1. Search for stockless exceptions.
2. To update the status for all displayed demand groups or warehouses:

Note: The displayed list depends on the choice made in the View Stockless Exceptions By area.

- a. In the Set All To field, select the new stockless status you want to apply.
 - b. Click **Update**.
3. To update a single status, in the Stockless Exception field, select the status of the displayed demand group or warehouse.
 - **No Exception:** No exception exists for the demand group/warehouse from the selected effective date onwards.
 - **Stocked:** An exception is present for the demand group/warehouse with a value of stocked from the effective date onwards. This exception will be used instead of the default warehouse/SKU type value.
 - **Stockless:** An exception is present for the demand group/warehouse with a value of stockless from the effective date onwards. This exception will be used instead of the default warehouse/SKU type value.

Define the Date the Stockless Exception is Valid

1. In the To date field, select the last day the exception is effective.
OR
Select No End Date to indicate the that the stockless exception never expires.
2. In the next field, enter the last day an exception is valid.
3. Click Save. You are prompted to confirm your decision.
4. Click **OK**.

Create Warehouse Ordering Parameters

Order Groups

Create Order Groups

Order groups are used to group source demand groups together to enable more efficient maintenance of ordering lead times within the supply chain. Order groups are only used at the chamber level. They are not used for store ordering. By using order groups, you can put all the source demand groups that have the same ordering behavior into one group for maintenance. An order group is assigned to a single order cycle. All source/demand group/chambers assigned to that order group are then assigned the order lead times defined by that order cycle.

- **Manually created:** After you create the order group, you must assign the demand group to complete the order group.
- **System generated:** System generated order groups are created when the batch is run. One of the applicable scheduling locations is assigned to each order group generated. You can add or modify demand groups and order cycle assignments in the same manner as manually generated order groups.

Create an Order Group

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Ordering. Select the Order Groups tab..

Data Management Online - Warehouse - Warehouse Ordering - Order Groups

Warehouse Store General

Create Order Cycle Non Order/Non Delivery Days Scheduling Location Calendar

Time Balanced Order Source Splits Location Orderable Units Supplier Locks Order Groups

Selected Order Group 16SYS - FRITO-LAY, INC. Minneapolis1

Order Cycle OGWW - New Supplier Default Order Cycle **Automated Demand Group Assignment** Yes

Tier 1 **Automation Source** V5165 - FRITO-LAY, INC.

Collection Lead Time

Select Summary Demand Groups Automation Scheduling Location

Effective Date 09/19/2006

Tier 1

Order Group 16SYS - FRITO-LAY, INC. Minneapolis1

Scheduling Location None

Order Source None

Class None

Demand Group None

Automated Demand Group Assignment

☒ Both ☐ Yes ☐ No

Set As Working Group

Order Group	Scheduling Location	Order Source	Demand Group
16SYS - FRITO-LAY, INC. Minneapolis1			

Demand Groups

Order Groups Tab

1. Click Create. The Create Order Group window opens.

Order Cycle	Collection Lead Time
A2628 - Order Cycle 28x25	25
B0107 - Order Cycle 7x21	21
B2707 - Order Cycle 7x6	6
C0228 - Order Cycle 28x25	25
C2828 - Order Cycle 28x22	22
D0328 - Order Cycle 28x18	18

Create Order Group Window

2. In the Order Group Code field, enter a unique 5 character alphanumeric code for the order group.
3. In the Order Group Name field, enter a description of the order group.
4. Select the Automated Demand Group Assignment checkbox to indicate the system should automatically create demand group assignments for this order group when new SKU-pack sizes arrive in the AIP system.

Note: The automated order group assignments are created for the Automation Source and the Order Group's Automation Scheduling Locations. An assignment will be created when a new SKU-pack size arrives in the AIP system that is valid for the Automation Source and one or more Automation Scheduling Locations. An assignment will not be created for any existing source/destination combinations that already exist for the SKU-pack size's demand group

- a. Select the Automated Demand Group Assignment option. The Automation Source is enabled.
- b. Click the LOV  button and select an Automation Source.
5. In the Default Cycle Code field, select the order cycle associated with the order group.
 - a. Enter an order cycle code in the search box and press Enter.
 - b. Select the order cycle from the list.

Note: You can click **Display** to view the lead times for the order cycle.

6. Click **Save**. You are prompted to confirm your decision.
7. Click OK.
8. To complete the order group, you must assign demand groups to the order group.

Edit Order Groups

After you create order groups you may need to maintain them.

Working Order Groups

Setting the working order group allows you to navigate through the Summary, Demand Groups and Automation Scheduling Locations tabs.

Summary Tab

The Summary tab allows you to view sources, demand groups, and stocking points for the working order group selected. The effective date defaults to today. The live order cycle is displayed and the lists of sources, and scheduling locations are displayed for today's assignments.

Demand Group Tab

The Demand Groups tab allows you to edit the order group and create assignments for the working group.

Automation Scheduling Location Tab

In order for this tab to be enabled, the working order group must display Yes for the Automated Demand Group Assignment. The Automation Scheduling Location tab allows you to maintain the list of scheduling locations attached to the working order group. Only the scheduling locations linked to the order group will be automatically assigned to an Order Group Demand Group Assignment. Scheduling locations are warehouse chambers that will receive merchandise for the working order group. Scheduling locations can be added to or removed from the order group. The available and selected scheduling locations are displayed.

Note that it is possible for a warehouse to contain multiple scheduling locations, and therefore it is possible for a warehouse to be shown on both the available and selected sides if one of the locations has been selected and one has not.

Delete an Order Group

You must move all source/demand group/scheduling location assignments to a new order group, before you can delete the order group. The delete is effective immediately and no assignments can exist for today or future dates.

Set an Order Group as the Working Order Group

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Ordering. Select the Order Groups tab.

Data Management Online - Warehouse - Warehouse Ordering - Order Groups

Warehouse Store General

Create | Edit | Delete | Search | Display | Clear Criteria | Clear Results | Clear All | Apply | Save | Refresh | Help | Exit

Order Cycle | **Non Order/Non Delivery Days** | **Scheduling Location Calendar**

Time Balanced Order Source Splits | **Location Orderable Units** | **Supplier Locks** | **Order Groups**

Selected Order Group 16SYS - FRITO-LAY, INC. Minneapolis1

Order Cycle OGWW - New Supplier Default Order Cycle **Automated Demand Group Assignment** Yes

Tier 1 **Automation Source** V5165 - FRITO-LAY, INC.

Collection Lead Time

Select | Summary | Demand Groups | Automation Scheduling Location

Effective Date 09/19/2006

Tier 1

Order Group 16SYS - FRITO-LAY, INC. Minneapolis1

Scheduling Location None

Order Source None

Class None

Demand Group None

Automated Demand Group Assignment

☒ Both ☐ Yes ☐ No

Set As Working Group

Order Group	Scheduling Location	Order Source	Demand Group
16SYS - FRITO-LAY, INC. Minneapolis1			

Demand Groups

Order Groups Tab

- In the Effective Date field, select the date your changes become effective.
- Enter additional criteria to retrieve an order group.
 - Order Group:** Enter the order group ID or click the LOV  button and select an order group.
 - Scheduling Location:** Enter the scheduling location ID, or click the LOV  button and select a scheduling location.
 - Order Source:** Enter the order source ID, or click the LOV  button and select an order source.
 - Class:** Enter the class ID, or click the LOV  button and select a class.
 - Demand Group:** Enter the demand group ID, or click the LOV  button and select a demand group.
 - Automation Demand Group:** Select the following option to limit or expand the search results displayed.
 - Both:** Returns all matching search results regardless of whether they are assigned to an order group with automated demand group assignments enabled or disabled.
 - Yes:** Returns only matching search results which are assigned to an order group with automated demand group assignment enabled.

- **No:** Returns only matching search results which are assigned to an order group with automated demand group assignment disabled.
3. Click Search.
 4. In the Order Group column, select the order group you want to edit or view.
 5. Click **Set As Working Group**.

Edit an Order Group

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Ordering. Select the Order Groups tab.

1. Set an order group as the working order group.
2. Click **Edit**. The Edit Order Group window opens.

S	M	T	W	T	F	S
1	2	3	4	5	6	7

Edit Order Group Window

3. In the Order Group Name field, enter the new name.
4. If you want to remove the Automated Demand Group Assignment, which will remove any automation scheduling locations from the order group, de-select the Automated Demand Group assignment option.
If you want you want to change an order group so you can use automated scheduling locations, perform the following:
 - a. Select the Automated Demand Group Assignment option. The Automation Source field is enabled.
 - b. Click the LOV  button and select an Automation Source.
5. To enable a new order cycle.
 - a. Select the Update Order Cycle check box.
 - b. Select a new default order cycle to apply to the order group

- Click **Save**. You are prompted to confirm your decision.
- Click **OK**.

Delete an Order Group

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Ordering. Select the Order Groups tab.

1. Set an order group as the working order group.
2. Click Delete. You are prompted to confirm your decision.
3. Click **OK**.

Note: The order group can be deleted only if there are no assignments for today or in the future. Once deleted, the order group will be removed from the results block and cleared from the tab.

[View an Order Group Summary](#)

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Ordering. Select the Order Groups tab.

1. Set an order group as the working order group.
2. Select the Summary tab.

Warehouse

Store

General

Create

Edit

Delete

Search

Display

Clear Criteria

Clear Results

Clear All

Apply

Save

Refresh

Help

Exit

Order Cycle

Non Order/Non Delivery Days

Scheduling Location Calendar

Time Balanced Order Source Splits

Location Orderable Units

Supplier Locks

Order Groups

Selected Order Group

16SYS - FRITO-LAY, INC. Minneapolis1

Order Cycle

OGWW - New Supplier Default Order Cycle

Automated Demand Group Assignment

Yes

Tier

1

Automation Source

V5165 - FRITO-LAY, INC.

Collection Lead Time

Select

Summary

Demand Groups

Automation Scheduling Location

Effective Date

◀

09/19/2006

▼

Order Cycle Detail

Sep

Oct

T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M
19	20	21	22	23	24	25	26	27	28	29	30	1	2	3	4	5	6	7	8	9
						15							15						15	

Order Source

Scheduling Location

Demand Group

V5165 - FRITO-LAY, INC.

W109001 - Minneapolis1

Demand Groups

Summary Tab

3. In the Effective Date field, select the date you want to view a summary for.
4. Limit the data as necessary:
 - Select a supplier to limit the list of scheduling locations.

Note: Scheduling locations are limited to those that are linked to the working order group through the demand groups.

- Select a scheduling location to limit the suppliers.

Note: Suppliers are limited to those that are linked to the selected location to the working order group through the demand groups that are assigned.

5. Click **Demand Groups** to display a list of demand groups limited by selections in the Supplier and Scheduling Location lists.

Assign a Demand Group to an Order Group

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Ordering. Select the Order Groups tab.

1. Set an order group as the working order group.
2. Select the Demand Groups tab.

The screenshot shows the 'Data Management Online - Warehouse - Warehouse Ordering - Order Groups - Demand Groups' window. The 'Demand Groups' tab is active. The 'Selected Order Group' is '16SYS - FRITO-LAY, INC. Minneapolis1'. The 'Order Cycle' is 'OGVW - New Supplier Default Order Cycle'. The 'Tier' is '1'. The 'Collection Lead Time' is '1'. The 'Automated Demand Group Assignment' is 'Yes'. The 'Automation Source' is 'V5165 - FRITO-LAY, INC.'. The 'Effective Date' is '09/19/2006'. The 'Order Group', 'Scheduling Location', 'Order Source', 'Class', and 'Demand Group' fields are all set to 'None'. The 'Unassigned Demand Groups' checkbox is unchecked. The 'Automated Demand Group Assignment' section has radio buttons for 'Both', 'Yes', and 'No'. The 'Available Demand Groups' and 'Selected Demand Groups' sections are empty.

Demand Groups Tab

3. In the Effective Date field, select the date you want to view a summary for.
4. Enter additional criteria to retrieve a demand groups.
 - **Order Group:** Enter the order group ID, or click the LOV  button and select an order group. This option is available when the Unassigned Demand Group option is not selected.
 - **Scheduling Location:** Enter the scheduling location ID, or click the LOV  button and select a scheduling location.

- **Order Source:** Enter the order source ID, or click the LOV  button and select an order source. When using the LOV button, the window displays all suppliers and warehouses, which have at least one chamber that is NOT assigned a status of “New” or “Closed”.
 - **Class:** Enter the class ID, or click the LOV  button and select a class. Entering a class will filter demand groups based on the specified class.
 - **Demand Group:** Enter the demand group ID or click the LOV  button and select a demand group. Entering a demand group limits your search to valid order sources and scheduling locations for the specified demand group.
 - **Unassigned Demand Groups:** Select the Unassigned Demand Groups check box to return demand groups that are not assigned to an order group. Clear the checkbox to return demand group that are assigned to an order group on the specified effective date.
 - **Automated Demand Group Assignment:** Select the following option to limit or expand the search results displayed.
 - **Both:** Returns all matching search results regardless of whether they are assigned to an order group with automated demand group assignments enabled or disabled.
 - **Yes:** Returns only matching search results which are assigned to an order group with automated demand group assignment enabled.
 - **No:** Returns only matching search results which are assigned to an order group with automated demand group assignment disabled.
5. Click Search.
 6. Move the demand groups from the Available Demand Groups to the Selected Demand Groups area.

Note: Demand groups are in subfolders for each supplier.
Double-click a supplier folder to view the demand groups.

7. Click Save. You are prompted to confirm your decision.
8. Click **OK**.

Assign the Automation Scheduling Location to an Order Group

Navigate: Log on to Data Management. From the Warehouse menu, select Warehouse Ordering. Select the Order Groups tab.

1. Set an order group as the working order group.
2. Select the Automation Scheduling Location tab.

The tab displays Available Scheduling Locations, which can be added to the order group, and the Selected Scheduling Locations, which are currently assigned to the order group.

Automation Scheduling Location Tab

Note: The Automation Scheduling Location tab will only enable for Order Groups with Automated Demand Group Assignment set to Yes

3. Move the appropriate locations to the Selected Scheduling Locations area.
4. Click Save. You are prompted to confirm your decision.
5. Click **OK**.

Create a Supplier Lock

A supplier lock allows you to create a deal with the supplier contingent on your organization not changing the orders within an agreed period that is longer than the normal lead-time.

Supplier locks are entered as a rolling number of weeks – indicating the period of time inside which the existing orders are locked and cannot be changed by the system replenishment process. Each day, the number of weeks is assumed to start the Sunday of the current week (defined Sunday to Saturday). A supplier lock entered using this window remains in place until the you remove them.

Supplier locks are entered at 2 levels:

- **Supplier/class level:** Locks entered at the supplier/class level are applied to all SKUs in the class.
- **Supplier/SKU level:** You can enter a lock at the supplier/SKU level, regardless of whether one exists at the class level. Locks at the supplier/SKU level take precedence over those at the class level.

Create a Supplier Lock

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Ordering. Select the Supplier Locks tab.

Supplier Locks Tab

1. In the Supplier field, enter the supplier ID you want to create a lock for, or click the LOV  button and select a supplier.
2. Click **Create**. The Create New Supplier Lock window opens.

Create New Supplier Lock Window

3. In the Lock Level area, select the level the lock occurs.
4. In the Class field, enter the class the lock occurs for, or click the LOV  button and select a class.
5. If the lock occurs at the supplier/SKU level, in the SKU field, enter the SKU the lock occurs for, or click the LOV  button and select a SKU.

6. In the Locked Weeks field, enter the number of weeks that the lock is enabled for.
7. Click Save. You are prompted to confirm your decision.
8. Click **OK**.

Edit a Supplier Lock

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Ordering. Select the Supplier Locks tab.

1. Enter the criteria to retrieve a supplier lock.
 - **Supplier:** Enter the supplier ID, or click the LOV  button and select a supplier.
 - **Class:** Enter the class ID, or click the LOV  button and select a class.
 - **SKU:** Enter the SKU ID, or click the LOV  button and select a SKU.
2. Click Search.
3. To view SKUs in a class with an existing Supplier Lock:
 - a. Expand the class folder.
 - b. Select the Expand all check box.
4. Double-click on the Locked Weeks value to enable the value for editing.
5. Enter the new locked week value.

Note: Modified but not saved Lock Weeks are displayed in green.

6. Click Save. You are prompted to confirm your decision.
7. Click **OK**.

Remove a Supplier Lock

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Ordering. Select the Supplier Locks tab.

1. Enter the criteria to retrieve a supplier lock.
 - **Supplier:** Enter the supplier ID, or click the LOV  button and select a supplier.
 - **Class:** Enter the class ID, or click the LOV  button and select a class.
 - **SKU:** Enter the SKU ID, or click the LOV  button and select a SKU.
2. Click Search.
3. To view SKUs in a class with an existing Supplier Lock:
 - a. Expand the class folder.
 - b. Select the Expand all check box.
4. Select the check box in the Delete Lock column next to the class or SKU.
5. Click Save. You are prompted to confirm your decision.
6. Click **OK**.

Define Non-Order/Non-Delivery Days

The Non Order / Non Delivery Days window allows you to maintain non receipt and non release dates for the entire company. You create a non-order day to indicate that for that particular day, no product will be ordered from a source. You create a non-delivery day to indicate that for that particular day, no product will be received at the warehouse. Additionally, you can create exceptions by order group for non order dates and by delivery groups for non delivery dates.

Create a Non-Order Date

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Ordering. Select the Non Order/Non Delivery Days tab.

Non Order/Non Delivery Days Tab

1. Select Non-Order Date.
2. Click the calendar  button to select a non-order date.

Note: Dates in gray indicate that those dates are eligible to be created as a non-order day.

3. Click Create. You are prompted to confirm your decision.
4. Click **OK**.

Create or Delete an Order Group Exception for a Non-Order Date

1. Select the non-order date you want to create exceptions for.

Note: Dates selected for non-order are displayed in bold, black text.

2. Click **Search**.
 - Select Y from the Exceptions list next to an order group to indicate that SKU-packs in that order group can be ordered.
 - Select N from the Exceptions list next to an order group to indicate that SKU-packs in that order group cannot be ordered.
 - Click Set All to No Exception to remove the exceptions for all available order groups.
 - Click **Search** to set all the exception indicators to their original value.
3. Click Save. You are prompted to confirm your decision.
4. Click **OK**.

Create a Non-Delivery Date

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Ordering. Select the Non Order/Non Delivery Days tab.

Select **Non-Delivery Date**.

Click the calendar  button to select a non-delivery date.

Note: Dates in gray indicate that those dates are eligible to be created as a non-delivery day.

Click **Create**. You are prompted to confirm your decision.

Click **OK**.

Create or Delete a Delivery Group Exception for a Non-Delivery Date

1. Select the date you want to create exceptions for.

Note: Dates selected for non-delivery are displayed in bold, black text.

2. Click Search.
 - Select Y from the Exceptions list next to a delivery group to indicate that SKU-packs in that delivery group can be received.
 - Select N from the Exceptions list next to a delivery group to indicate that SKU-packs in that delivery group cannot be received.
 - Click Set All to No Exception to remove the exceptions for all available delivery groups.
 - Click **Search** to set all the exception indicators to their original value.
3. Click Save. You are prompted to confirm your decision.
4. Click **OK**.

Maintain Order Cycles

The Order Cycle window allows you to define the amount of time a source needs deliver SKUs to the next location in the supply chain. Order lead times may not be less than zero. A zero lead time represents same day, continuous replenishment. On any given day an order lead time may be blank, representing no lead time for that day.

The collection lead time may not be less than one day. The collection lead time may be blank, representing no collection lead time for that order cycle. If a collection lead time is present, it must be less than the order lead time for any day in the cycle.

Search for an Order Cycle

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Ordering. Select the Order Cycle tab.

Data Management Online - Warehouse - Warehouse Ordering - Order Cycle

Warehouse Store General

Create Edit Delete Search Display Clear Criteria Clear Results Clear All Apply Save Refresh Help Exit

Time Balanced Order Source Splits Location Orderable Units Supplier Locks Order Groups

Order Cycle Non Order/Non Delivery Days Scheduling Location Calendar

Select Order Cycle

A2628 - Order Cycle 28x25
B0107 - Order Cycle 7x21
B2707 - Order Cycle 7x6
C0228 - Order Cycle 28x25
C2828 - Order Cycle 28x22
D0328 - Order Cycle 28x18
D2907 - Order Cycle 7x6
E0414 - Order Cycle 14x17
E3028 - Order Cycle 28x24
F0507 - Order Cycle 7x7
F3114 - Order Cycle 14x6
G0607 - Order Cycle 7x3
G3228 - Order Cycle 28x1
H0728 - Order Cycle 28x20
H3328 - Order Cycle 28x11
I0814 - Order Cycle 14x22

Order Cycle Length 28
Collection Lead Time 24

S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21
22	23	24	25	26	27	28														

Order Cycle

25	17	16	13	11	24	13	3	20	27	26	15	14	20	7	19	9	3	13	6	20
----	----	----	----	----	----	----	---	----	----	----	----	----	----	---	----	---	---	----	---	----

Order Cycle Tab

- Select the order cycle you wish to view from the list of order cycles:
 - Select the order cycle in the list.
 - In the Select Order Cycle field, enter the order cycle ID and press Enter.
- Click **Display**.

Create an Order Cycle

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Ordering. Select the Order Cycle tab.

- Click **Create**. The Create Order Cycle window opens.

Create Order Cycle

* Order Cycle Code

* Order Cycle Name

* Order Cycle Length 7

Collection Lead Time

S	M	T	W	T	F	S
1	2	3	4	5	6	7

* Order Cycle

Save Cancel

Create Order Cycle Window

2. In the Order Cycle Code field, enter an ID for the order cycle.

Note: Order cycle codes must consist of alphanumeric characters and must be unique.

3. In the Order Cycle Name field, enter a name for the order cycle.
4. In the Order Cycle Length field, select the length of the order cycle.
5. In the Collection Lead time field, enter a collection lead time.
6. Enter order lead times:
 - a. Double-click a cell in the Order Cycle grid.
 - b. Enter the lead time in the cell. You must enter an order lead time for at least one day in the cycle.
 - c. Press **Enter** or click away from the cell.
7. Click Save. You are prompted to confirm your decision.
8. Click **OK**.

Delete an Order Cycle

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Ordering. Select the Order Cycle tab.

1. Search for an order cycle.
2. Click Delete. You are prompted to confirm your decision.
3. Click **OK**.

Select the Default Orderable Unit for a Warehouse

The Location Orderable Units tab allows you to assign valid SKU pack size as the default orderable unit for each supplier/demand group/scheduling location.

Select the Default Orderable Unit for a Warehouse

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Ordering. Select the Location Orderable Units tab.

Location Orderable Units Tab

1. In the Effective Date field, select the date your changes become effective.
2. Enter additional criteria to retrieve a delivery group.
 - Order Source: Enter the supplier ID or warehouse ID, or click the LOV  button and select a warehouse.
 - Class: Enter the class ID, or click the LOV  button and select a class.
 - Demand Group: Enter the demand group ID, or click the LOV  button and select a demand group.
3. Click Search.
4. Move a scheduling location from the Available Locations area to the Selected Locations area
5. Select a single location you wish to view.
6. Click Display.
7. In the Set Orderable Units field, select a SKU-pack size.
8. Click Save. You are prompted to confirm your decision.
9. Click **OK**.

Time Balanced Order Source Splits

The Time Balanced Order Source Splits tab allows you to determine how an order quantity should be requested from multiple sources that supply the product.

SKUs in demand groups can be supplied to a warehouse by another warehouse or a supplier. When multiple sources exist, the order quantity generated is divided across the sources. DM online uses time balanced order source split to determine how orders are divided across sources.

When you enter percentages for each source, the percentages indicate that from the effective date onwards, the entered percentages of volume will be received from each source over time. It is considered time balanced because over time, Oracle Retail Warehouse Replenishment Planning attempts to balance the distribution of orders across the sources so that the desired percentages are achieved. On any specific day, the orders do not need to be divided out according to the stated percentages. This allows for the fact that some sources may not be able to deliver on a particular date or day of week.

Create Time Balanced Order Source Splits

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Ordering. Select the Time Balanced Order Source tab.

The screenshot shows the 'Data Management Online - Warehouse - Warehouse Ordering' window. The 'Time Balanced Order Source Splits' tab is active. The interface includes a left-hand menu with buttons: Create, Edit, Delete, Search, Display, Clear Criteria, Clear Results, Clear All, Apply, Save, Refresh, Help, and Exit. The main area contains the following fields and sections:

- Effective Date:** A date picker set to 01/05/2007.
- Demand Group:** A text field with a LOV (List of Values) button, containing the value '100035032A - MONITOR,CRT,A91F+, ULTRA BRIGHT'.
- Available Destination Warehouses:** A large empty list box on the left.
- Selected Destination Warehouses:** A large empty list box on the right.
- Displayed Destination Warehouse:** A section showing 'W1105 - AIP CHICAGO CSC'.
- Table:** A table with columns: Order Source, Type, Displayed Split %, and New Split %.
- Total:** A label at the bottom left of the table area.
- 100:** A value at the bottom right of the table area.
- Reset Order History:** A button at the bottom left.

Time Balanced Order Source Splits Tab

1. In the Effective Date field, select the date the split begins.
2. In the Demand Group field, enter the demand group ID that the split applies to, or click the LOV  button and select a demand group.
3. Click Search.
4. Move a Destination Warehouse from the Available Destination Warehouses area to the Selected Destination Warehouse area.

5. Select the destination you want to view from the Selected Destination Warehouse list.
6. Click Display.
7. In the New Split % column, double-click the cell you want to update and enter the source percentages for the Selected Destination Warehouse.

Note: For each demand group and destination warehouse, the total from all sources must equal one hundred percent (100%) before you can save.

8. Click Save. You are prompted to confirm your decision.
9. Click **OK**.

Resetting Order History

The Time Balanced Order Source Split percentages are achieved over time as a result of maintaining the total historical order quantity for each source, demand group, and warehouse. The **Reset Order History** button allows the user to clear the order history for the demand group at the selected warehouses. The history is cleared for all sources of the demand group and selected warehouse(s) that are assigned a split percentage, regardless of effective date.

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Ordering. Select the Time Balanced Order Source tab.

10. In the Demand Group field, enter the demand group ID of the history to be cleared, or click the LOV  button and select a demand group.
11. Click Search.
12. Move a Destination Warehouse from the Available Destination Warehouses area to the Selected Destination Warehouse area.
13. Click **Reset Order History**. You are notified that the history is cleared regardless of the selected effective date.

Note: Once any value is entered into the New Split % column, the Reset Order History button will be disabled.

14. Click **OK**.
15. You are prompted to confirm your decision to clear the history.
16. Click **OK**.

Secondary Sources

A secondary or alternate source is a source that should be used to provide inventory in the event of a shortage caused by the original source's inability to meet unconstrained demand.

The Secondary Sources tab allows you to maintain a prioritized list of alternate sources by Demand Group/Destination warehouse. This list is used whenever a shortage is experienced for a SKU-pack within the Demand Group at the specified location. The sequence in which sources appear on the list reflects the preferred order in which the alternate sources should be used to satisfy shortages.

In DM Online, you can add or delete secondary sources for a Demand Group/Destination warehouse, or change the priority sequence of existing secondary sources.

Maintain the Secondary Sources List

Navigate: Log into Data Management. From the **Warehouse** menu, select **Warehouse Ordering**. Select the **Secondary Sources** tab.

Data Management Online - Warehouse - Warehouse Ordering - Secondary Sources

Warehouse Store General

Order Cycle: Time Balanced Order Source Splits | Non Order/Non Delivery Days | Secondary Sources | Location Orderable Units | Supplier Locks | Scheduling Location Calendar | Order Groups

* Demand Group: 100118137A - AIP CHAIR, LEATHER, W/OUT ARMS

Available Destination Warehouses

- W1050 - AIP TEST CSC4
- W1070 - AIP TEST CSC2
- W1080 - AIP TEST CSC1
- W1090 - AIP MINNEAPOLIS CSC
- W1122 - AIP CHARLOTTE CSC
- W1170 - AIP HAMILTON CSC
- W1171 - AIP TEST CSC3
- W1214 - AIP BUFORD CSC
- W2080 - St Paul CSC
- W222222223 - W. ValueMart VWH 11

Selected Destination Warehouses

- W1091 - AIP DETROIT CSC
- W1105 - AIP CHICAGO CSC

Displayed Destination Warehouse: None

Selected Secondary Sources (Maximum: 5)

Priority	Order Source	Type	Delete
1	V4314 - AIP NORSTAR OFFICE PRODUCTS DBA	Supplier	☐
2	W2055 - AIP LANSING, IL	Warehouse	☐

Add Secondary Source: None

Buttons: Check All, Uncheck All, Update List

Secondary Sources Tab

1. In the Demand Group field, enter the Demand Group ID to which the secondary source applies, or click the **LOV**  button and select a Demand Group.
2. Click **Search**.
3. Move the desired destination warehouse from the Available Destination Warehouses area to the Selected Destination Warehouse area.
4. Select the destination you want to view from the Selected Destination Warehouse list and click **Display**. If any secondary sources for the selected Demand Group/Destination exist, they are displayed.

Note: If you move a destination warehouse from the Available Destination Warehouses area to the Selected Destination Warehouse area, and the warehouse has been selected as a secondary source, you will be given a warning message indicating that the warehouse will be removed from the Selected Secondary Sources list should you choose to continue.

Add Secondary Sources

Navigate: Log into Data Management. From the **Warehouse** menu, select **Warehouse Ordering**. Select the Secondary Sources tab.

1. In the Add Secondary Source field, enter the new secondary source, or click the LOV



button and select a secondary source.

2. Click **Update List** to add the selected source to the Selected Secondary Sources list.

Note: If you add a warehouse to the Selected Secondary Sources list that has also been chosen as a destination warehouse, you will be given a warning message indicating that the warehouse will be removed from the Selected Destination Warehouses list should you choose to continue.

3. Click **Save**.

Note: The list of Selected Secondary Sources, visible in the screen at the time of clicking **Save**, will replace any previously saved list. Therefore, at the time of saving, the Selected Secondary Sources must display the complete list of valid secondary sources for the Demand Group/Destination(s).

4. A verification window will prompt you to confirm your decision. Click **OK**.

Deleting Secondary Sources

Navigate: Log into Data Management. From the **Warehouse** menu, select **Warehouse Ordering**. Select the Secondary Sources tab.

Deleting Single or Multiple Secondary Sources

You have the option to select one or more sources to delete for a Demand Group/Destination location.

1. To delete a secondary source, enable the **Delete** checkbox; multiple sources may be selected for deletion.
2. Click Update List to remove the selected source(s) from the Selected Secondary Sources list.
3. Click Save.
4. A verification window will prompt you to confirm your decision. Click **OK**.

Note: Use the **Uncheck All** checkbox to deselect all sources checked for deletion prior to clicking the **Update List** button.

Deleting All Secondary Sources

You also have the option to delete all secondary sources for a Demand Group/Destination location.

1. To delete all secondary sources, select the **Check All** checkbox.
2. Click Save.
3. A verification window will prompt you to confirm your decision. Click **OK**.

Changing Secondary Source Priority

Navigate: Log into Data Management. From the **Warehouse** menu, select **Warehouse Ordering**. Select the Secondary Sources tab.

The secondary sources are displayed in a prioritized sequence. You can change the priorities of secondary sources by moving a source up or down in the secondary source list.

1. To move a secondary source to a higher or lower priority, select the desired source in the Selected Secondary Sources area.
2. Use the Up  or Down  buttons to move the source higher or lower in the list.
3. Click Save.
4. A verification window will prompt you to confirm your decision. Click **OK**.

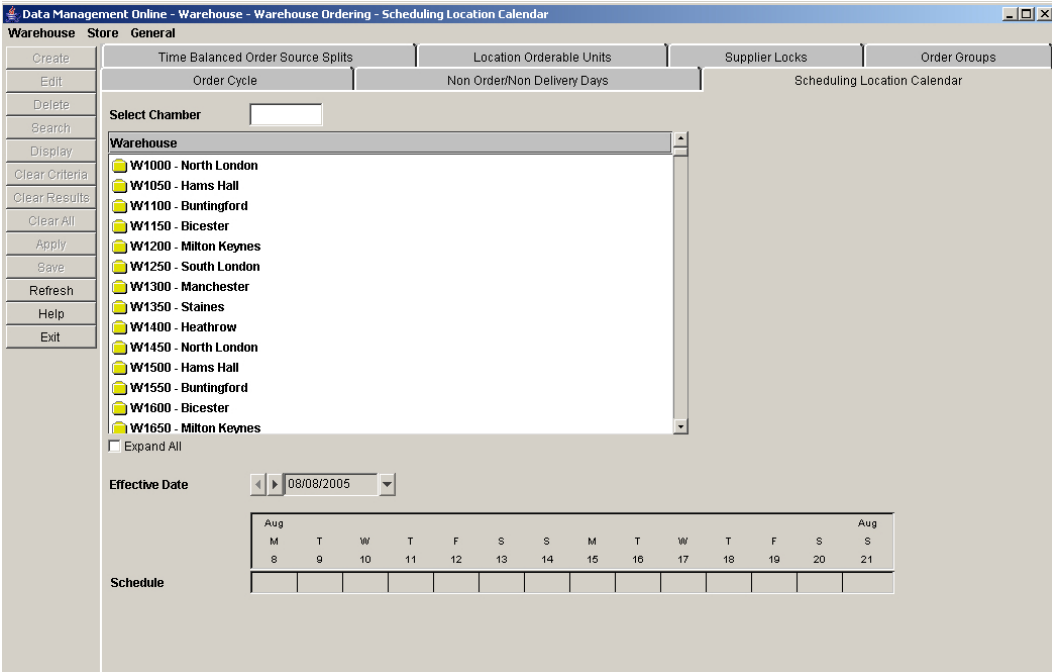
View the Scheduling Location Calendar

The Scheduling Location Calendar window displays the calendar associated with a specific scheduling location that indicates which days inventory can be received. If shifts exist on a given day for a scheduling location, the location is deemed open for receiving inventory that day.

Scheduling location calendars are calculated by the data you enter into other areas of Data Management online (DMo). This window allows you view access only. You must update the appropriate area of DMo in order to update the calendar.

Display the Calendar for a Scheduling Location

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Ordering. Select the Scheduling Location Calendar tab.



Data Management Online - Warehouse - Warehouse Ordering - Scheduling Location Calendar

Warehouse Store General

Create Time Balanced Order Source Splits Location Orderable Units Supplier Locks Order Groups

Edit Order Cycle Non Order/Non Delivery Days Scheduling Location Calendar

Delete

Select Chamber

Search

Display

Clear Criteria

Clear Results

Clear All

Apply

Save

Refresh

Help

Exit

Warehouse

- W1000 - North London
- W1050 - Hams Hall
- W1100 - Buntingford
- W1150 - Bicester
- W1200 - Milton Keynes
- W1250 - South London
- W1300 - Manchester
- W1350 - Staines
- W1400 - Heathrow
- W1450 - North London
- W1500 - Hams Hall
- W1550 - Buntingford
- W1600 - Bicester
- W1650 - Milton Keynes

☐ Expand All

Effective Date

Aug														Aug
M	T	W	T	F	S	S	M	T	W	T	F	S	S	
8	9	10	11	12	13	14	15	16	17	18	19	20	21	

Schedule

Scheduling Location Calendar Tab

1. In the Chamber field, enter a two or more digits of the chamber ID.
2. Press Enter.
3. In the Effective Date field, select the first date you want to view the calendar for.
4. Click **Display**.