

Oracle® Retail Advanced Inventory Planning
Data Management User Guide
Release 13.4

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Oracle Retail Advanced Inventory Planning Data Management User Guide, Release 13.4.

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document.

Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
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Preface

The *Oracle Retail Advanced Inventory Planning Data Management 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.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible to all users, including users that are disabled. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Accessibility standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For more information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

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Related Documents

For more information, see the following documents in the Oracle Retail Advanced Inventory Planning Release 13.4 documentation set:

- *Oracle Retail Advanced Inventory Planning Administration Guide*
- *Oracle Retail Advanced Inventory Planning Data Management Online Help*
- *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*
- *Oracle Retail Advanced Inventory Planning Implementation Guide*
- *Oracle Retail Advanced Inventory Planning Installation Guide*
- *Oracle Retail Advanced Inventory Planning Operations Guide*
- *Oracle Retail Advanced Inventory Planning Order Management Online Help*
- *Oracle Retail Advanced Inventory Planning Order Management User Guide*
- *Oracle Retail Advanced Inventory Planning Release Notes*
- *Oracle Retail Advanced Inventory Planning Store and Warehouse Replenishment Planning Online Help*
- *Oracle Retail Advanced Inventory Planning Store and Warehouse Replenishment Planning User Guide for the RPAS Classic Client*
- *Oracle Retail Advanced Inventory Planning Store and Warehouse Replenishment Planning User Guide for the RPAS Fusion Client*

The following documentation may also be needed when implementing AIP:

- *Oracle Retail Planning Batch Script Architecture (BSA) Implementation Guide*
- *Oracle Retail Integration Bus (RIB) documentation, based on type of deployment*
- *Oracle Retail Extract Transform and Load (RETL) documentation*
- *Oracle Retail Predictive Application Server (RPAS) documentation*

My Oracle Support Documents

These Oracle Retail Advanced Inventory Planning Release 13.4 documents are available on My Oracle Support:

- *Oracle Advanced Inventory Planning Calculations for Store and Warehouse Replenishment Planning*
- *Oracle Retail Advanced Inventory Planning SRP/WRP Replenishment Method Related Parameters*

Customer Support

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

<https://support.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

When you install the application for the first time, you install either a base release (for example, 13.4) or a later patch release (for example, 13.4.2). If you are installing the base release, additional patch, and bundled hot fix releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch and bundled hot fix releases can contain critical information related to the base release, as well as information about code changes since the base release.

Oracle Retail Documentation on the Oracle Technology Network

Documentation is packaged with each Oracle Retail product release. Oracle Retail product documentation is also available on the following Web site:

http://www.oracle.com/technology/documentation/oracle_retail.html

(Data Model documents are not available through Oracle Technology Network. These documents are packaged with released code, or you can obtain them through My Oracle Support.)

Documentation should be available on this Web site within a month after a product release.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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. AIP 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.

AIP 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 AIP, the supply chain is aligned into a virtual enterprise, and the retailer gains visibility across the supply chain to demand, supply and any constraints.

AIP is composed of two parts:

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

This chapter provides an introduction to 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 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:

- Must be a minimum of six (6) characters and maximum of 128 characters.
- Must contain at least five different characters.
- Must not be simple.
- Cannot include sequences such as ABCDE or ABCXYZ.
- Cannot contain more than four consecutive characters.
- Cannot be based on your user name or your full name.
- Cannot be based on a previous password.
- 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**. AIP displays the User Console.

Note: If the User Console is visible when you log in, then proceed to Step 5.

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

Changing Your Password

Perform the following steps to change your password:

1. Log on to Oracle Retail Advanced Inventory Planning (AIP).
2. On the User Console, click **Applications**.
3. Click **Change Password**.
4. In the Current Password field, enter the password you used to log in to the application.
5. In the New Password field, enter the password you want to use in the future.
6. In the Retype password field, enter the password you entered in the New Password field.
7. Click **Change Password**.

Note: Click the **Return to front page without changing password** link to cancel your changes.

Exiting AIP

Perform the following steps to log off of AIP:

1. Click **Exit**. AIP returns you to the User Console.

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

2. Click **Log Out**.

The AIP Workspace

After logging into AIP, you have access to the application window. The primary elements of the application window are shown in [Figure 2-1](#) and are described in [Table 2-1](#).

Figure 2–1 AIP Workspace

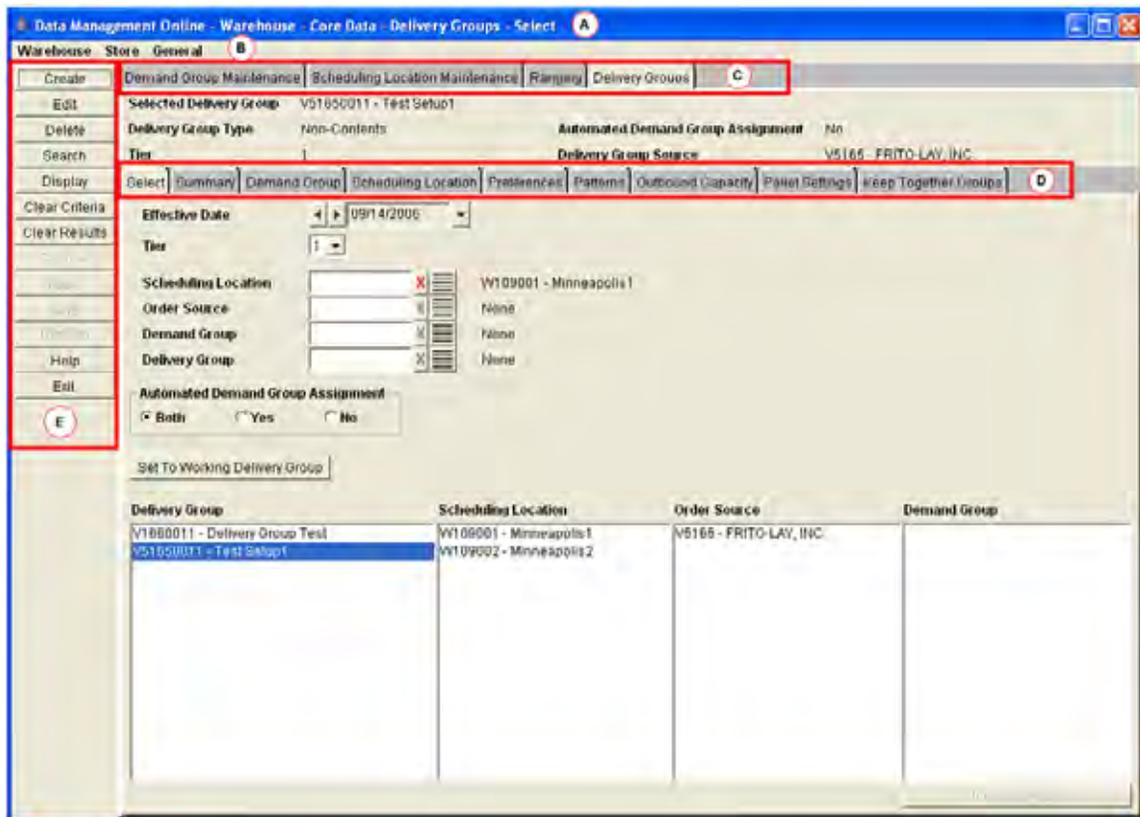


Table 2–1 AIP Workspace Elements

Item	Element	Description
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 underneath 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.

The options for entering or selecting data depend on the type of data that may be required or permitted in the field. Some fields are restricted as to the type of data that may be entered and may only permit:

- numeric data
- alphabetic data
- alphanumeric data
- data in a specific format

Some fields permit only one value, while others permit multiple values.

Calendars, drop-down lists and lists of values provide you with access to pre-formatted, predefined values. Instructions for using these tools are provided in the following sections.

Using a Calendar Button

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

Figure 2–2 Date Picker Window



Select a Date

Perform the following steps to 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.

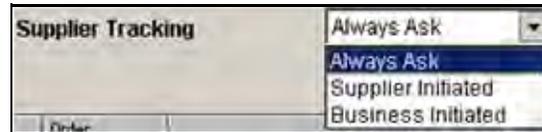
Move the Date

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.

Figure 2–3 Drop-down List



1. Click the drop-down button next to a field. A list of predefined values appears.
2. If necessary, scroll through the list until the appropriate value appears.
3. 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 the previous field. These fields are indicated by arrows pointing to them from other fields.

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

Figure 2–4 Example of Field-Level Filters

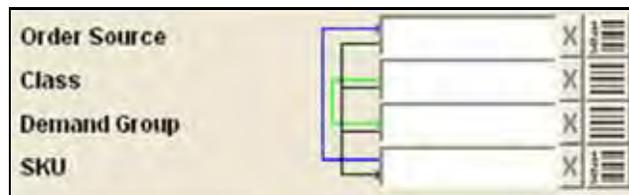


Table 2–2 Description of Field-Level Filters

Field Name	Results in Limits to:	Indicated by:
Order Source, Class, and Demand Group	Stock Keeping Unit (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 List of Values (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.

Figure 2–5 Clear LOV Button



To clear the field, click the clear LOV button.

Figure 2–6 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:

Table 2–3 LOV Button Descriptions

Image	Button	Description
	LOV buttons	Allow you to pick from a list of valid data that can be used in the field. LOV buttons only allow you to make one selection.
	Multi-select LOV buttons	<p>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:</p> <ul style="list-style-type: none"> ■ Removing assigned values, which places them back in the available list. ■ 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 an ellipse.

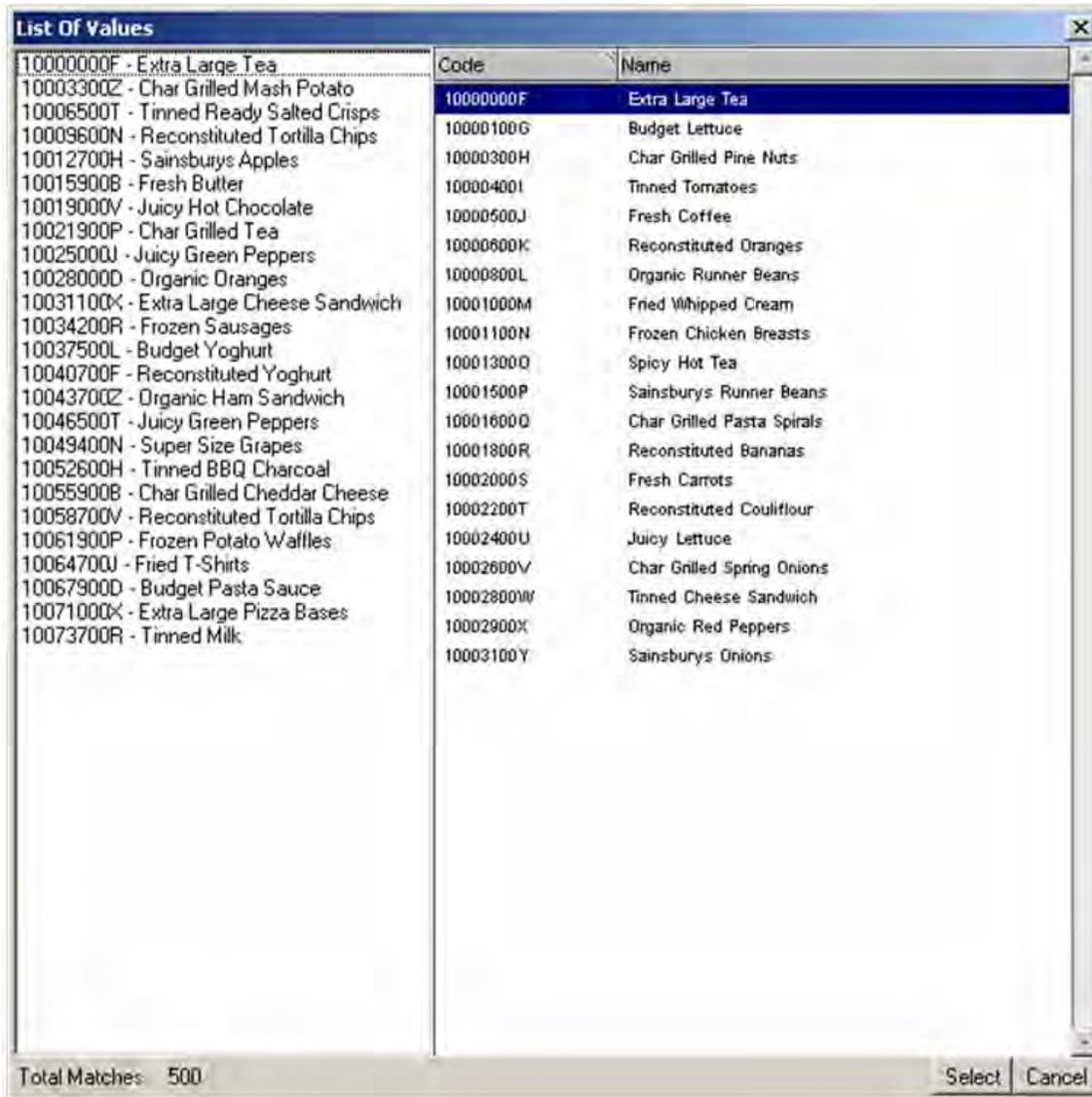
The list of values window displays the first set of 20 values and a paging mechanism. To view additional sets of information, select from the list on the left side.

Using LOV Buttons

Perform the following steps to use the 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.

Figure 2–7 List of Values Window



Note: You can enter information into the field before you click the LOV button. A partial list of values is returned 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.

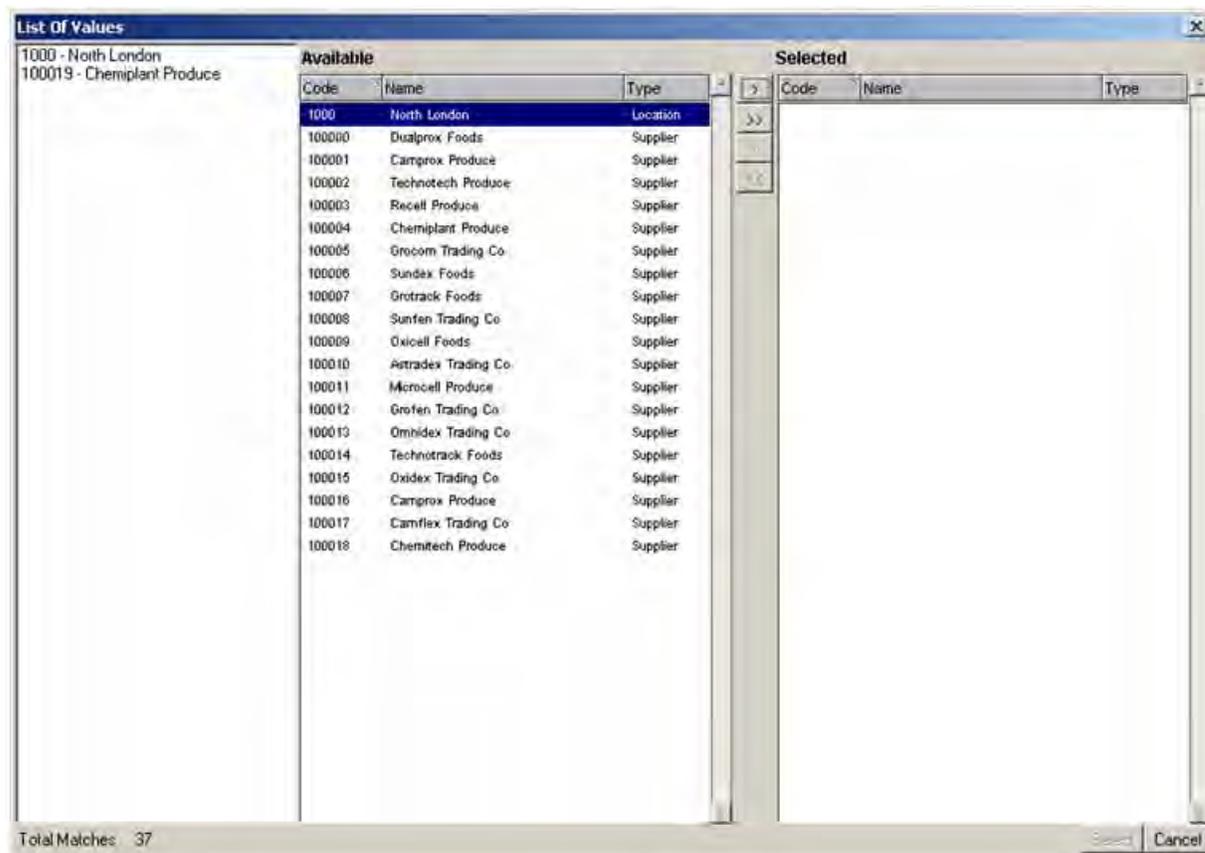
2. Select a value. Page as necessary to find your value.
3. Click **Select**. The field is automatically filled in with the selected value.

Using a Multi-Select LOV Button

Perform the following steps to use the 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.

Figure 2–8 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 returned 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 unnecessary 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:

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

Move Buttons

The move buttons allow you to transfer values between the transfer boxes.

Table 2–4 *Move Button Descriptions*

Image	Button	Description
	Move Right	Moves selected values to the right side transfer box.
	Move All Right	Moves all values to the right side transfer box.
	Move Left	Moves selected values to the left side transfer box.
	Move All Left	Moves all values to the left side transfer box.

Using a Transfer Box

Perform the following steps to use a transfer box:

1. Select the appropriate values:
2. Select one or more values in the available values box.
3. 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.

4. Remove unnecessary values:

5. Select one or more values in the selected values box.
6. 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.

Figure 2–9 Example of Table Data Sorted by Multiple Columns - Alert Status and Priority

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-JPR-06, Source: 100139, Demand Group: 100056, 2	New Source Split		04/12/2008

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.

Figure 2–10 Example of Paging Controls



Table 2–5 Description of Paging Controls

Image	Button	Description
	Next	To page forward, click the Next button. The next page of records appears.
	Previous	To page backward, click the Previous button. The previous page of records appears.
	First Page	To view the first page of records, click the First Page button. The first page of records appears.
	Last Page	To view the last page of records, click the Last Page button. The last page of records appears.
	Go to Page	Enter a page number in the Go to Page box and click Go . The specified page of records appears.

Using the Online Help

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

About the Online Help

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

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 to 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.

- Searches are not case sensitive. You can type your search in uppercase or lowercase characters.
- 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 **Enter**. Topics that match your search criteria display in the left pane.
4. Select a topic to view it.

Data Management: General

This chapter provides general information about using Data Management.

Introduction to Oracle Retail Data Management

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.

Alerts

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.

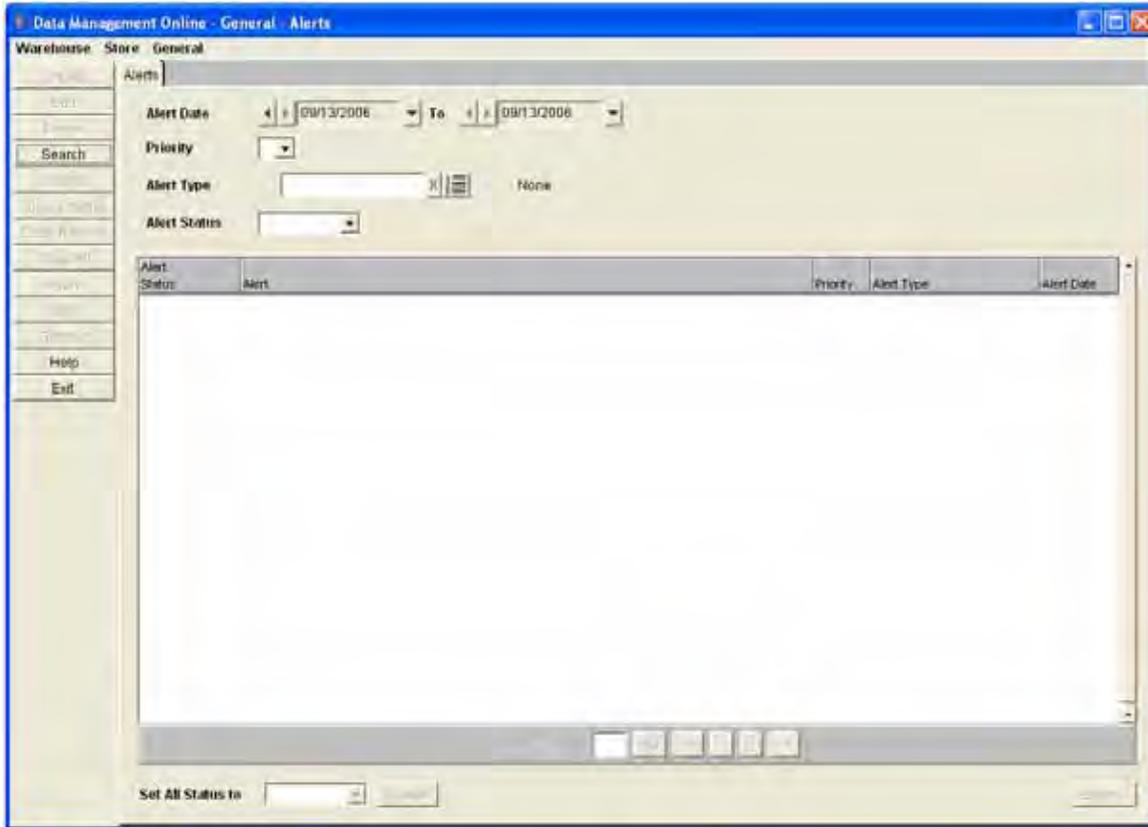
View Alerts

The Alerts tab allows you to view exception information that is produced by the over-night 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 (DM).

Search for Alerts

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

Figure 3–1 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 are 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

This section includes:

- [Maintain Planning Horizons](#)
- [View a Store Ordering or Warehouse Ordering Schedule](#)
- [Maintain the Receiving Calendar](#)

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.

Figure 3–2 Planning Horizon Maintenance Tab

1. Select the Default Horizon option.
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**.

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.

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.

Maintain the Receiving Calendar

The Receiving Calendar window allows you to specify the days a location is available to receive inventory. You can define the receiving schedule in 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.
- An exception to the default receiving pattern. This is the pattern that the location uses for receiving during the time period you specify.
- An exception to a specific date. The change you make only applies to the effective date you selected.

Search for a Receiving Schedule

Navigate: Log into Data Management. From the General menu, select Core Data.

Figure 3–4 Receiving Calendar

1. In the Effective Date field, select the date the location can begin receiving.
2. In the Destination Type, select either **Store** or **Warehouse**.
3. Enter search criteria to retrieve store calendar information.
 - In the SKU type field, select a SKU type.
 - In the Store Format field, select a location format.
4. Click **Search**.
5. Move the location you want to update to the Selected Destinations area.
6. Select a location in the Selected Destinations area.
7. Click **Display**.

Establish a New Receiving Default Pattern

Perform the following steps to 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 location is open for receiving.
 - **N** to indicate the location is closed for receiving.
3. Click **Save**. You are prompted to confirm your decision.

4. Click **OK**.

Create a New Location Exception Pattern

Perform the following steps to create a new Location Exception Pattern:

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

Create a Date Update for a Location Receiving Schedule

Perform the following steps to create a date update for a Location Receiving Schedule:

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

Profiles

This section includes:

- [Create a Profile](#)
- [Profile Maintenance](#)
- [Profile Exceptions](#)

Create a Profile

A profile is a collection of SKUs. The profiles describe the ordering cycle that gets an item into 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, or a supplier profile, or both.

- **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.

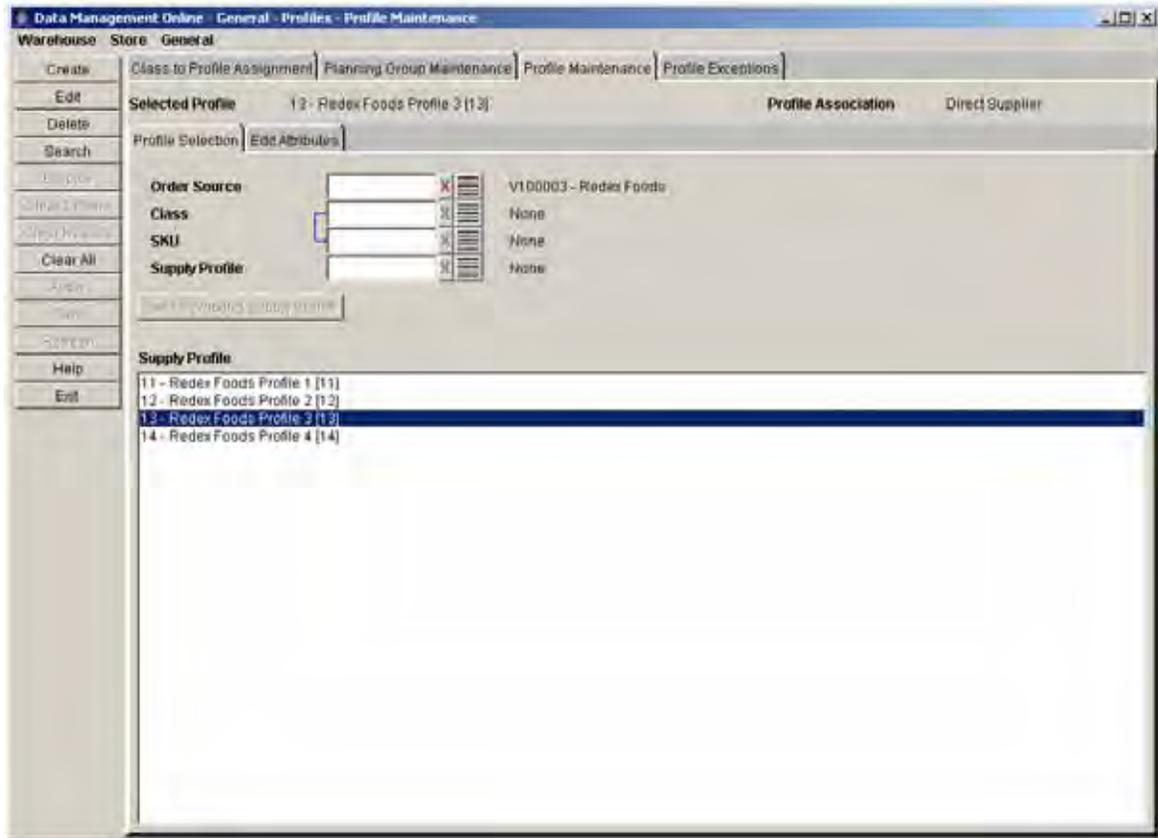
You can assign SKUs to both warehouse and supplier profiles. A SKU may exist in multiple supplier profiles, but only in one warehouse profile on a particular date.

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.

Figure 3–5 Profile Selection Tab



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

Figure 3–6 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.

Figure 3–7 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

This section provides information about maintaining profiles.

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 are 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 are 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. 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 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.

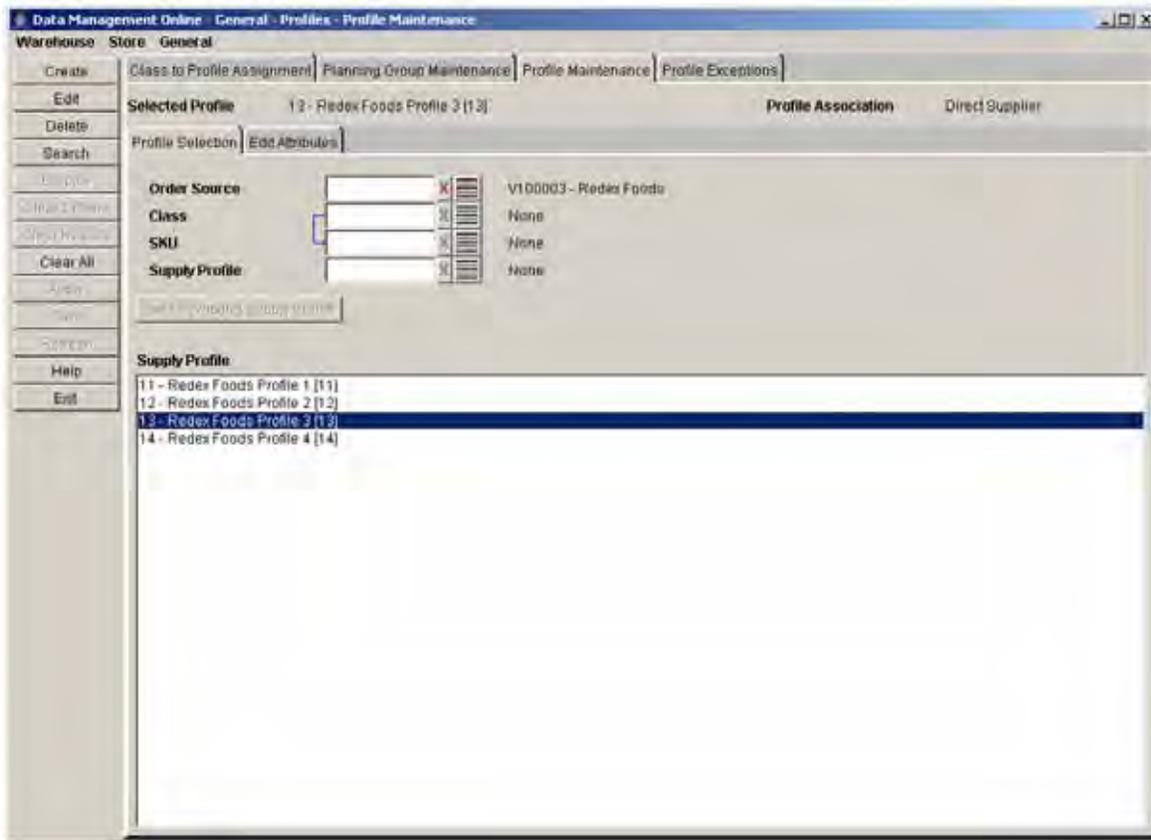
Profile/Store Order Cycle

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 seven-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.

Figure 3–8 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.

Figure 3–9 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.

Figure 3–10 Store Order Cycle Tab

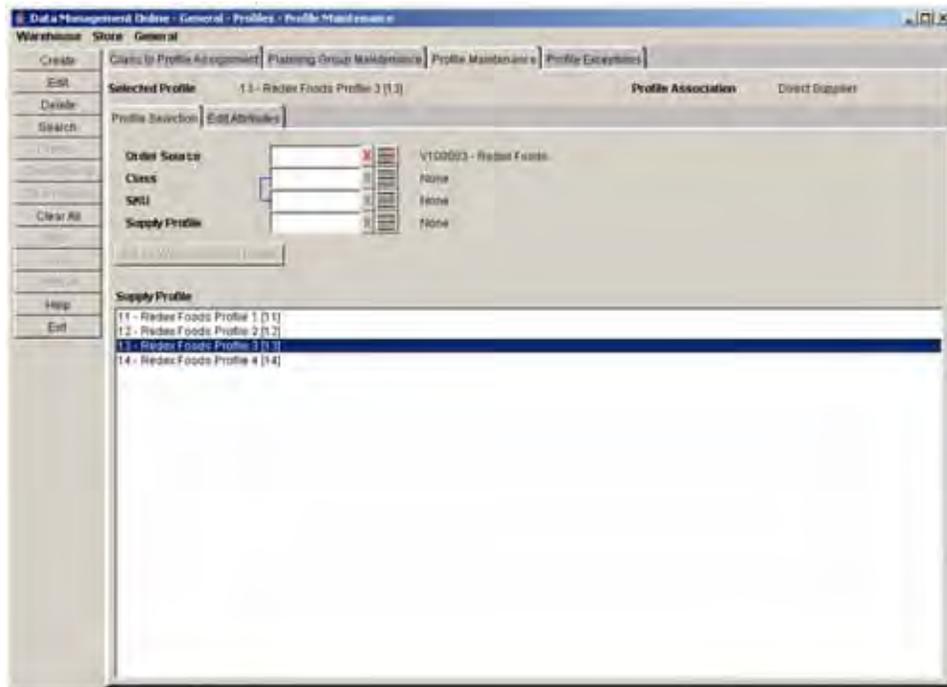
The screenshot shows the 'Store Order Cycle' tab in the Data Management Online interface. The window title is 'Data Management Online - General - Profiles - Profile Maintenance - Edit Attributes - Store Order Cycle'. The 'Selected Profile' is '193 - V5195 FRITO-LAY, INC'. The 'Effective Date' is set to '2/11/2006'. The 'Store Order Cycle' field is empty, with a 'None' option and a LOV button. Below it, a calendar grid shows the current store order cycle for the week of Feb 14-20, 2006, with days T, F, S, M, T, W, T. A 'Default Settings' section shows a grid for days S, M, T, W, T, F, S.

4. In the Effective Date field, select the date by which 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

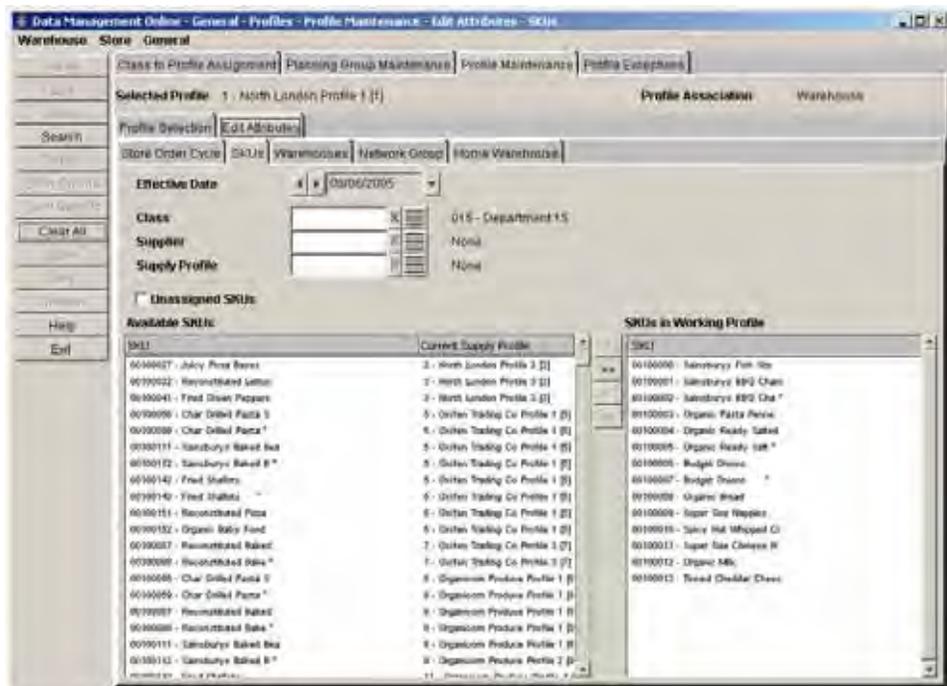
Navigate: Log into Data Management. From the General menu, select Profiles. On the Profile Maintenance primary tab, select the Profile Selection secondary tab.

Figure 3–11 Profile Selection Tab



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

Figure 3–12 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 the Working Profile area display 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 the Working Profile area.

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

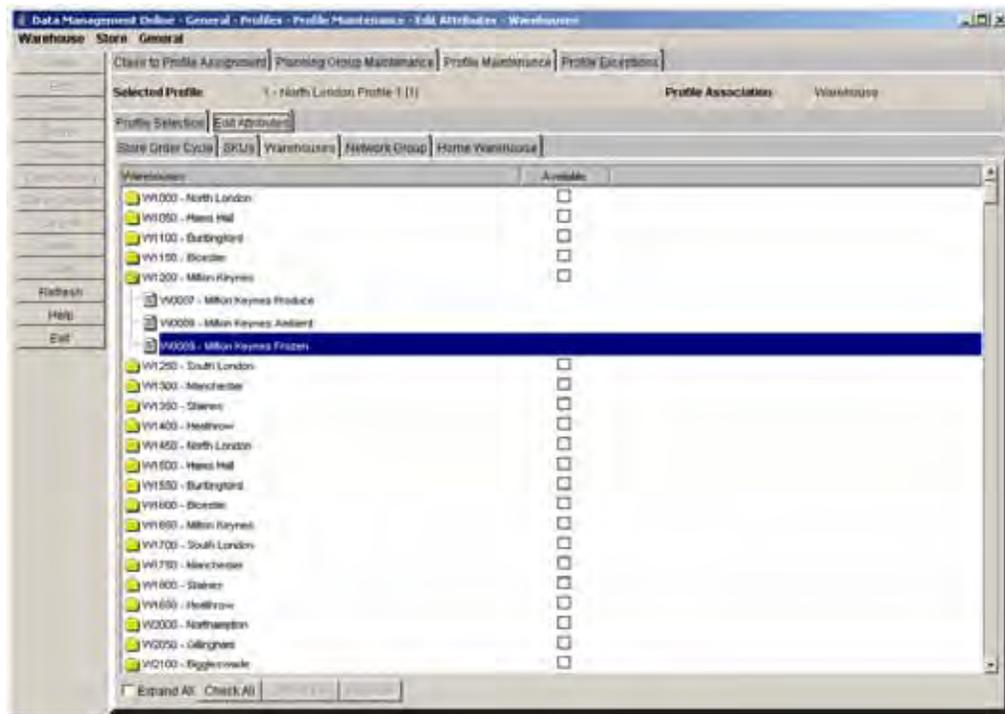
7. Click **Save**. You are prompted to confirm your decision.
8. Click **OK**.

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.

Figure 3–13 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**.

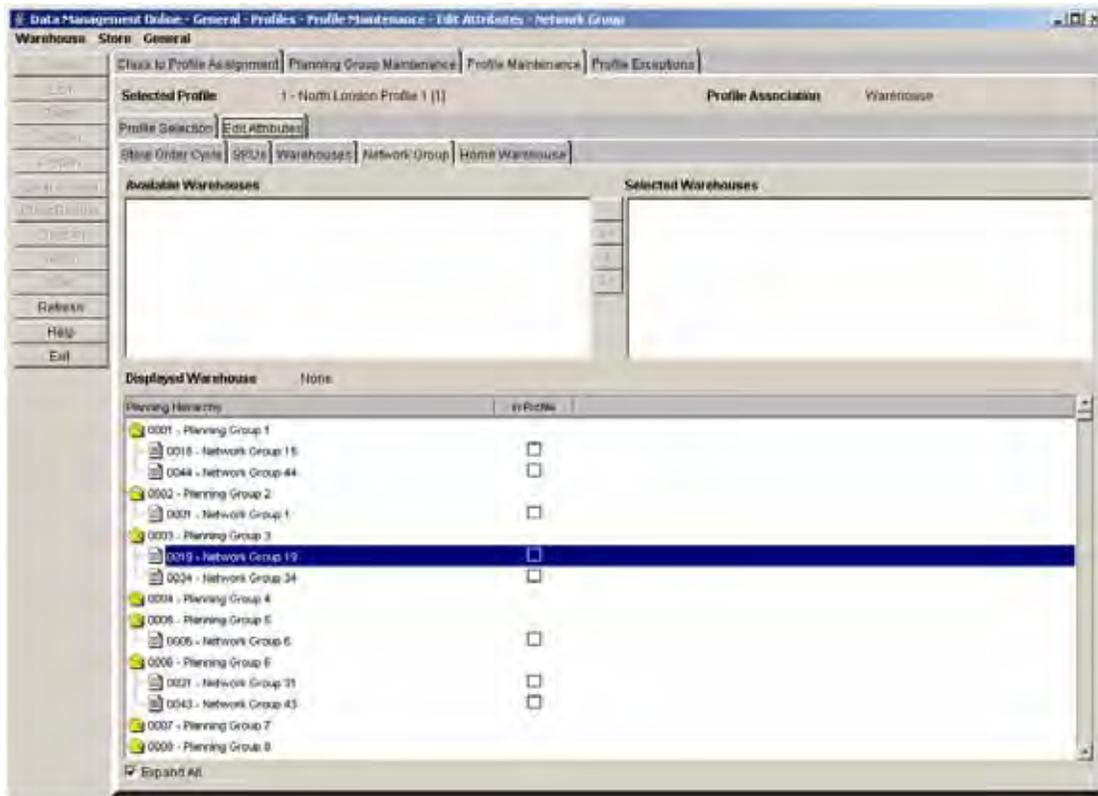
Maintain Network Groups for a Profile

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.

Figure 3–14 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

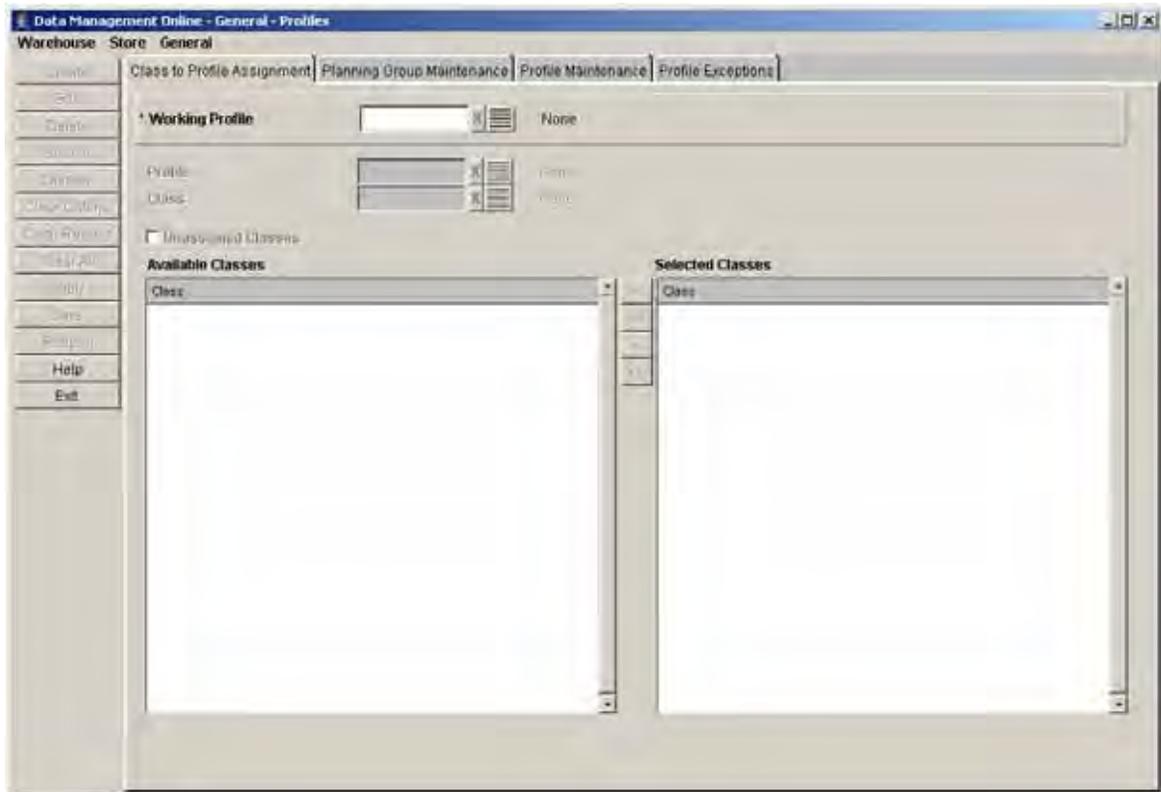
A class-to-profile assignment specifies a single warehouse profile to which new SKUs in the class are assigned when the system is configured to perform automatic assignment based on Class. Profile assignment occurs automatically each night when new SKUs arrive in the AIP system. Each class may be assigned 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.

Figure 3–15 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 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.

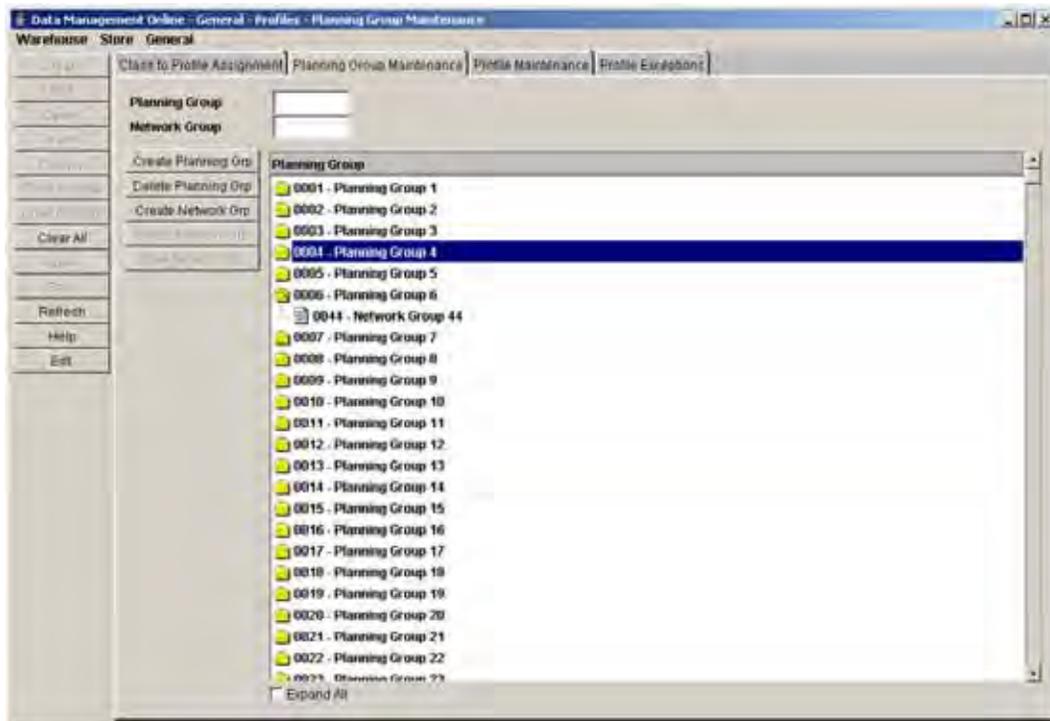
Table 3–1 Planning and Network Groups

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

Search for a Planning or Network Group

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

Figure 3–16 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.

Figure 3–17 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**.

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.

Figure 3–18 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

This section provides information on how to:

- [Copy Profile Exceptions](#)
- [Maintain Exceptions for Release and Placement Schedule at the Profile Level](#)
- [Maintain Exceptions to the Store Order Cycle at the Profile Level](#)

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.

1. In the Effective Date field, select the first date the exceptions become 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 a 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

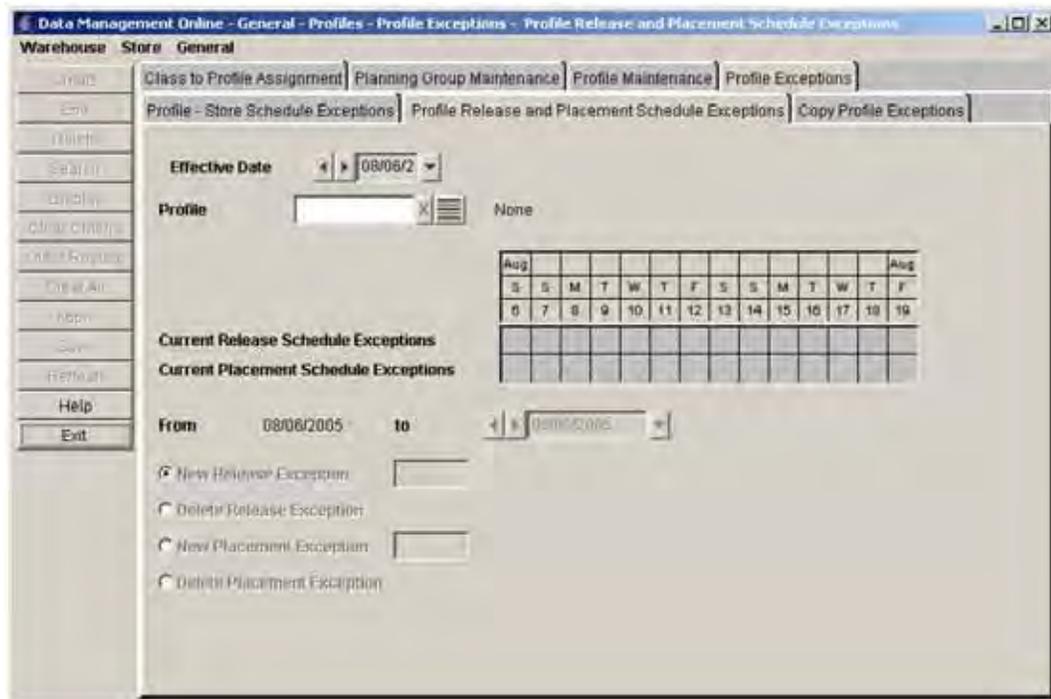
The release schedule for a profile is defined when you create the order cycle and assign it to a profile. After you associate an order cycle to a profile, you may need to create exceptions for a period of time. An exception to the order cycle at the profile level is always used instead of the default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

Figure 3–19 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

Perform the following steps to 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

Perform the following steps to 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

Perform the following steps to 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

Perform the following steps to 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.

Figure 3–20 Profile Store Schedule Exceptions Tab

The screenshot displays the 'Profile Store Schedule Exceptions' tab in the Data Management Online system. The interface includes a navigation pane on the left with options like Warehouse, Store, and General. The main window has several tabs: 'Class to Profile Assignment', 'Planning Group Maintenance', 'Profile Maintenance', 'Profile Exceptions', 'Profile - Store Schedule Exceptions', 'Profile Release and Placement Schedule Exceptions', and 'Copy Profile Exceptions'. The 'Profile - Store Schedule Exceptions' tab is active, showing an 'Effective Date' field set to 08/06/2005, a 'Profile' dropdown set to 'None', and a 'Store Format' dropdown set to 'None'. Below these are two large empty boxes for 'Available Stores' and 'Selected Stores'. A 'Displayed Store' field is also set to 'None'. A table shows 'Current Profile - Store Exception values' for days of the week (Aug 8, 9, 10, 11, 12). At the bottom, there are 'Effective from' and 'to' date fields (both 08/06/2005), a checkbox for 'Profile - Store Exceptions', a field for 'Exclude Store Order Cycle (Y)', and a checkbox for 'Exclude Profile - Store Exceptions'.

1. In the Effective Date field, select the date that the exceptions will be 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

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 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 Smoothing and Scaling Settings

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 has 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.

In contrast to ordering up to a certain amount, the desire to not exceed a warehouse receipt capacity is also an important consideration for planning. Point-in-time replenishment has limited ability to react to excessive receipts without causing a loss of sales. However, AIP's forward-looking plan can be used to anticipate such occurrences. When identified, orders can be pushed up to earlier days with open receiving capacity. This ensures all forecasted needs are met (that is, no lost sales) without straining warehouse receiving resources.

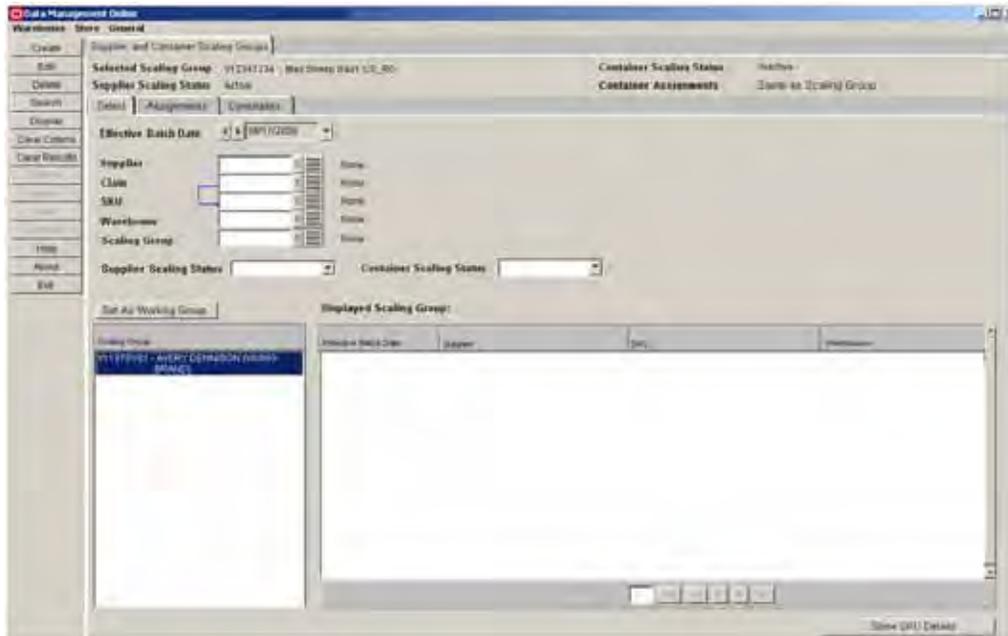
Supplier and Container Scaling Groups

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

Set a Working Scaling Group

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

Figure 3–21 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 drop-down list.
 - **Container Scaling Status:** Select Active or Inactive from the drop-down 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**.

Figure 3–22 Create Scaling Group Window



2. Complete the fields in the Create Scaling Group window as described in [Table 3–2](#).

Table 3–2 Create Scaling Group Window Fields

Field	Parameters	Use
Scaling Group Code	Any combination of alpha-numeric characters up to five 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 clear the check box.	Enables or makes unavailable the Supplier Scaling Horizon Days.
Supplier Scaling Horizon Days	Up to three 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 check box is selected. Performs supplier scaling for the number of days specified.
Container Scaling	Select or clear the check box.	Enables or makes unavailable the Container Scaling Horizon Days and Container Assignments.
Container Scaling Horizon Days	Up to three 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 check box 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 check box is selected. Determines whether containers are built for one source/destination each or all in the Scaling Group.
Smoothing	Select or clear the check box.	Enables or makes unavailable the execution of order smoothing.
Smoothing Horizon Days	Use the Global Horizon, enter a number of days up to three digits in length with a value greater than 0, or use the planning horizon.	Available if the Smoothing check box is selected. Performs smoothing for the number of days specified.

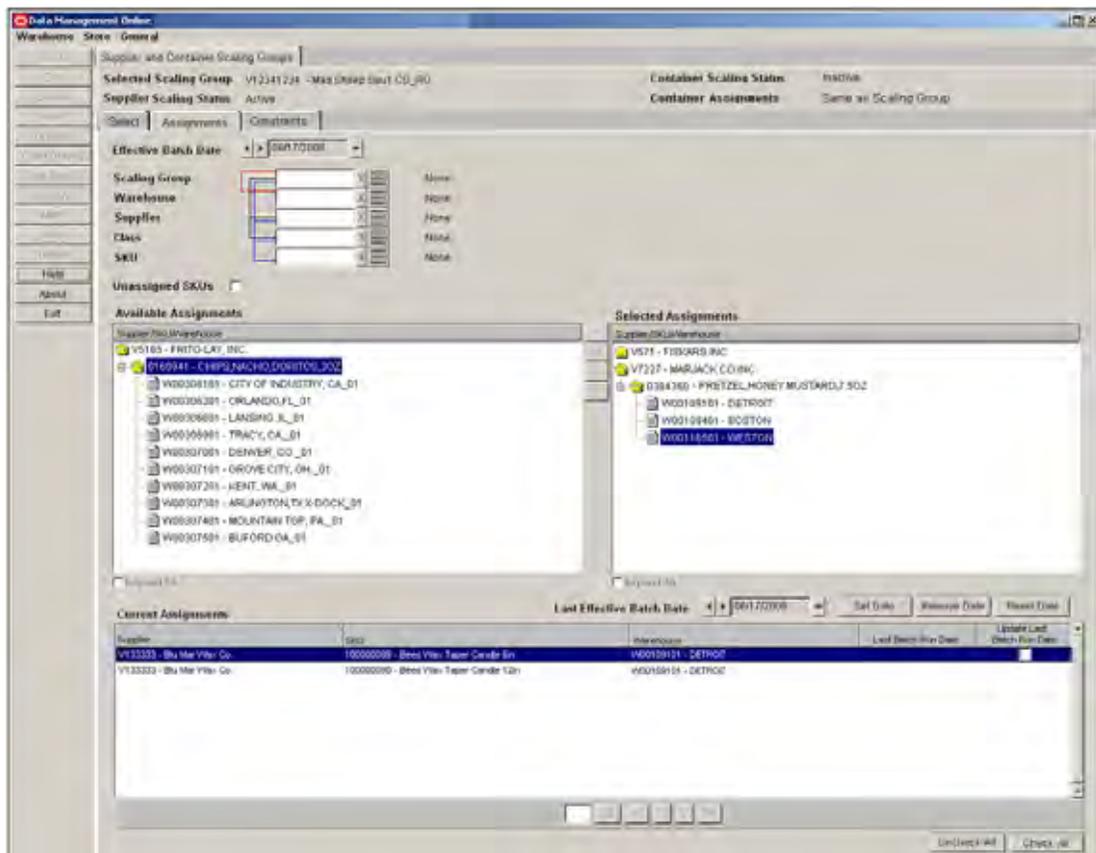
- To save your Scaling Group, click **Save**.

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. Follow the steps to Set a Working Scaling Group. From the Supplier and Container Scaling Groups primary tab select the Assignments tab.

Figure 3–23 Supplier and Container Scaling Groups: Assignments Tab



Selecting and Viewing Assignments for Scaling Groups

Perform the following steps to select and view assignments for Scaling Groups:

- In the Effective Batch Date field, select an effective date using the calendar button.
- 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 check box 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. Click **Display**. The Current Assignments list shows the assignments currently saved for the selected Effective Batch Date.

Editing Assignments for Scaling Groups

Note: When modifying or removing the Last Batch Run Date of an assignment, the new value must not overlap the start date of an assignment to a new Scaling Group.

Perform the following steps to edit assignments for Scaling Groups:

1. Display the desired assignment by Viewing Assignments for Scaling Groups.
2. Perform the steps in [Table 3-3](#) to edit assignments:

Table 3-3 *Editing Assignments for Scaling Groups Steps*

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, and select the Update Last Batch Run Date check box.	Set Date
Remove a Last Batch Run Date:	highlight the row in the Current Assignments grid, and select the Update Last Batch Run Date check box.	Remove Date
Reset an assignment's saved Last Batch Run Date:	highlight the row in the Current Assignments grid, and select the Update Last Batch Run Date check box.	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. Follow the steps to [Set a Working Scaling Group](#). From the Supplier and Container Scaling Groups primary tab, select the Constraints tab.

Figure 3–24 Supplier and Container Scaling Groups: Constraints Tab

Effective Release Date	To Release Date	Minimum	Maximum	UOM	Primary Container Constraint
20-Jan-2008	15-Mar-2008				
Supplier Constraints					
Minimum Cost		4500.00		USD	
Minimum Case Qty		25		Case	
Container Constraints					
Container Weight		2200.00	25000.00	Pounds	<input checked="" type="checkbox"/>
Container Pallet Qty			25	Pallet	
16-Mar-2008	No End Date				
Supplier Constraints					
Container Constraints					
Container Weight		2200.00	25000.00	Pounds	<input checked="" type="checkbox"/>
Container Pallet Qty			25	Pallet	

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. Follow the steps to [Set a Working Scaling Group](#). From the Supplier and Container Scaling Groups primary tab select the Constraints tab.

1. From the Constraints tab, click **Create**. The Create Scaling Groups Constraints window opens with either the Supplier Constraints tab ([Figure 3–25](#)) or Container Constraints tab ([Figure 3–26](#)), depending on which scaling modules are enabled.

Figure 3–25 Create Scaling Groups Constraints: Supplier Constraints Tab

The screenshot shows the 'Create Scaling Group Constraints' dialog box with the 'Supplier Constraints' tab selected. The window title is 'Create Scaling Group Constraints'. At the top, there is a 'Copy From Scaling Group' dropdown menu showing 'V12341234 - Mad Sheep Sausf CS_RG'. Below it is a 'Copy From Date' field with a date picker set to '03/16/2008' and a 'Copy' button. The 'Effective Release Date' field also has a date picker set to '03/16/2008'. To its right are radio buttons for 'To Release Date' (unchecked) and 'No End Release Date' (checked). The 'Supplier Constraints' section includes a 'Cost' section with 'Currency' set to 'USD' and a 'Minimum' input field. Below that is a 'Quantity' section with radio buttons for 'Pallets' (unchecked), 'Cases' (checked), and 'Eaches' (unchecked), and a 'Minimum' input field. At the bottom are 'OK', 'Clear', and 'Cancel' buttons.

Figure 3–26 Create Scaling Groups Constraints: Container Constraints Tab

The screenshot shows the 'Create Scaling Group Constraints' dialog box with the 'Container Constraints' tab selected. The window title is 'Create Scaling Group Constraints'. At the top, there is a 'Copy From Scaling Group' dropdown menu showing 'V12341234 - Mad Sheep Sausf CS_RG'. Below it is a 'Copy From Date' field with a date picker set to '01/25/2008' and a 'Copy' button. The 'Effective Release Date' field also has a date picker set to '01/25/2008'. To its right are radio buttons for 'To Release Date' (unchecked) and 'No End Release Date' (checked). The 'Container Constraints' section includes a 'Volume' section with 'UOM' set to 'Cubic Feet' and 'Minimum' and 'Maximum' input fields. Below that is a 'Weight' section with 'UOM' set to 'Pounds' and 'Minimum' and 'Maximum' input fields. The 'Quantity' section has radio buttons for 'Pallets' (unchecked), 'Cases' (checked), and 'Eaches' (unchecked), and 'Minimum' and 'Maximum' input fields. The 'Cost' section has 'Currency' set to 'USD' and 'Minimum' and 'Maximum' input fields. At the bottom are 'Primary Constraint' and 'Tolerance' dropdown menus, and 'OK', 'Clear', and 'Cancel' buttons.

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 a 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. Follow the steps to [Set a Working Scaling Group](#). 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, depending on which row was selected.

Figure 3–27 Edit Scaling Groups Constraints: Supplier Constraints Tab

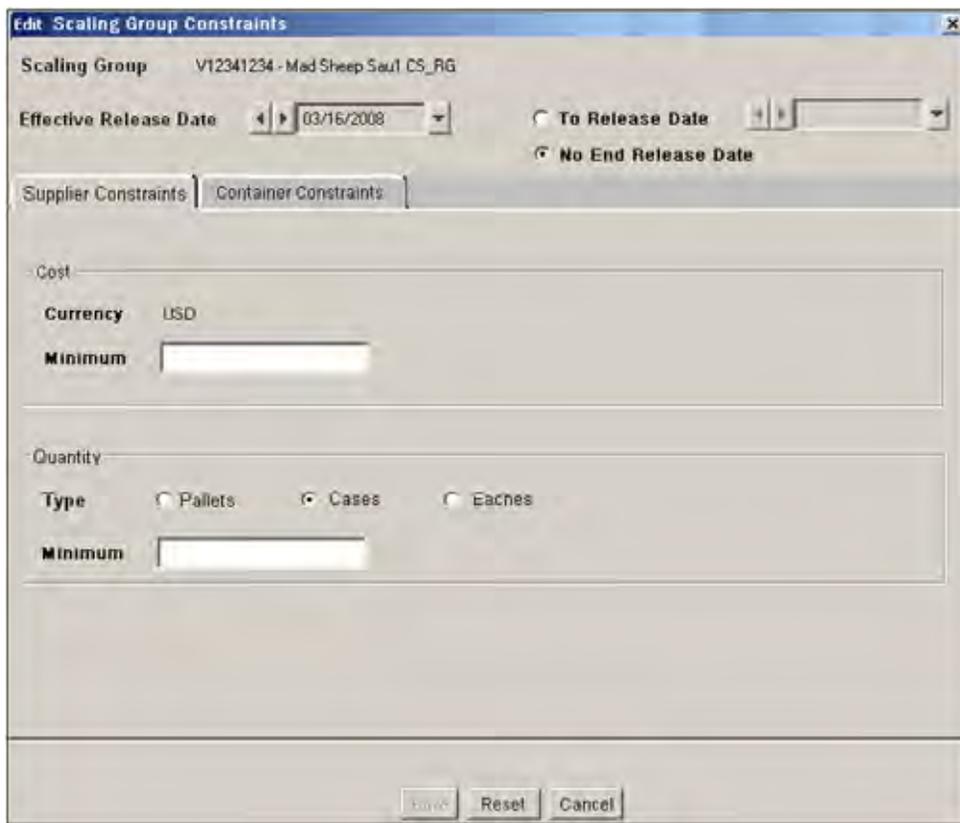


Figure 3–28 Edit Scaling Groups Constraints: Container Constraints Tab

The screenshot shows the 'Edit Scaling Group Constraints' dialog box with the 'Container Constraints' tab selected. The 'Scaling Group' is 'V12341234 - Mad Sheep Sau1 OS_RG' and the 'Effective Release Date' is '01/25/2008'. The 'To Release Date' is set to 'No End Release Date'. The 'Container Constraints' section includes:

- Volume:** UOM is 'Cubic Feet'. Minimum and Maximum fields are empty.
- Weight:** UOM is 'Pounds'. Minimum is '22000.00' and Maximum is '25000.00'.
- Quantity:** Type is 'Pallets' (selected). Minimum is '25' and Maximum is '28'.
- Cost:** Currency is 'USD'. Minimum and Maximum fields are empty.
- Primary Constraint:** Set to 'Quantity'.
- Tolerance:** Set to '0 %'.

Buttons for 'Save', 'Reset', and 'Cancel' are at the bottom.

Note: Currently effective constraints can only be ended. To modify the constraints, end the current ones and create a new constraint effective the next day.

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.

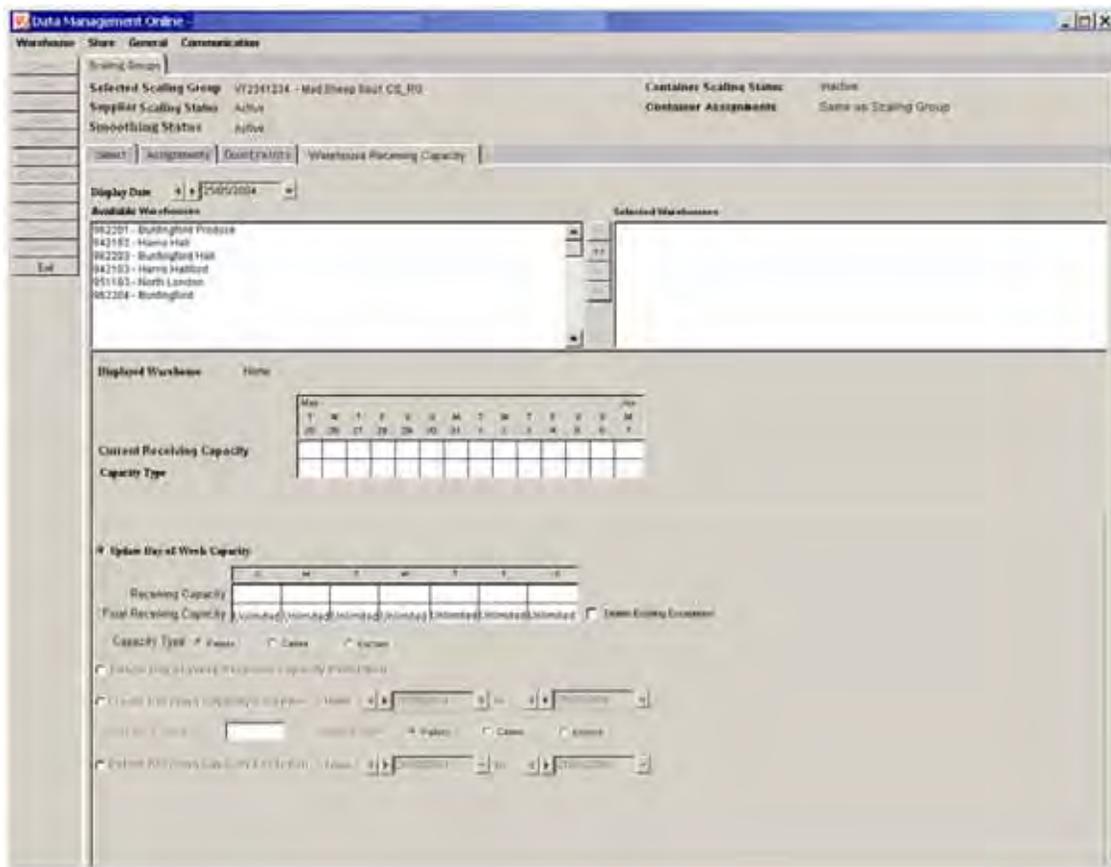
1. Follow the steps for [Selecting and Viewing Assignments for Scaling Groups](#).
2. Select the Constraints tab.
3. Highlight the Effective Release Date folder of the constraints to delete.
4. Click **Delete**.

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

Access the Warehouse Receiving Capacity Tab

Navigate: From the General Menu click Scaling Groups. The Select tab appears. Follow the instructions in Help to [Set a Working Scaling Group](#). Click the Warehouse Receiving Capacity tab.

Figure 3-29 Warehouse Receiving Capacity Tab



Warehouse Receiving Capacity Tab Functionality

To view the current receiving capacity of a warehouse, perform the following:

1. Select a date from the **Display Date** picker.

2. Use the dual selector to select a warehouse to display.
3. On the left panel, click **Display** to generate these actions:
 - Populate the current receiving capacity grid
 - Populate the Day-of-Week (DOW) default grid with the DOW default data in the database for the selected display date, warehouse, and working scaling group combination.
 - Populate both the receiving capacity and final receiving capacity pattern rows with data from the database.
 - The **Capacity Type** button which matches the Day-of-Week Receiving Capacity Type button is selected.
 - The **Displayed Warehouse** label updates to show the code and name of the highlighted location.

Modifications

You can affect change by making the following button selections:

Update Day-of-Week Capacity Default

Once the Day-of-Week default grid is enabled, you can make the following changes.

To ...	Then...
Enter a value or to edit a displayed value:	Double-click in a cell in the receiving capacity row. Enter any integer value between 1 and 99,999. The display-only final receiving capacity row displays the value in the capacity cell, or <i>Unlimited</i> if no capacity value is entered.
Remove all existing receiving capacity exceptions:	Checking the delete existing exceptions removes all existing receiving capacity exceptions (for the selected warehouses) in the database from the next day onwards once the new pattern is saved.

Delete Day-of-Week Receiving Capacity Restriction

The Create/Delete Exception Date controls are unavailable along with the exception capacity field.

Create Receiving Capacity Exceptions

If enabled, you can make the following changes:

To Edit the ...	Then...
Create Receiving Capacity Exception <i>From</i> and <i>to</i> date controls:	The <i>to</i> date must always be equal to or later than the <i>From</i> date. If an invalid date is selected, you receive an error message and the date is reset to its previous value.
Exception Receiving Capacity field:	Enter any integer value between 1 and 99,999.

Delete Receiving Capacity Exceptions

If enabled, you can make the following changes.

To Edit the ...	Then...
Delete Receiving Capacity Exception <i>From</i> and <i>to</i> date controls	The <i>to</i> date must always be equal to or later than the <i>From</i> date. If an invalid date is selected, you receive an error message and the date is reset to its previous value.

Save Button

On the left panel, **Save** is enabled when one or more warehouses have been moved to the selected side of the dual selector and one of the following options is selected:

- **Update Day-of-Week Capacity** button is selected and a valid receiving capacity is entered in one or more days.

Note: A capacity type must be selected as well. You will not have the ability to clear all selections.

- **Delete Day-of-Week Receiving Capacity Restriction** button is selected.
- **Create Receiving Capacity Exception** button is selected and a valid capacity is entered in the capacity field.
- **Delete Receiving Capacity Exception** button is selected.

Once you have made your changes, click **Save**. This only saves those changes associated with the button selections to the database.

SKU Attribute Maintenance

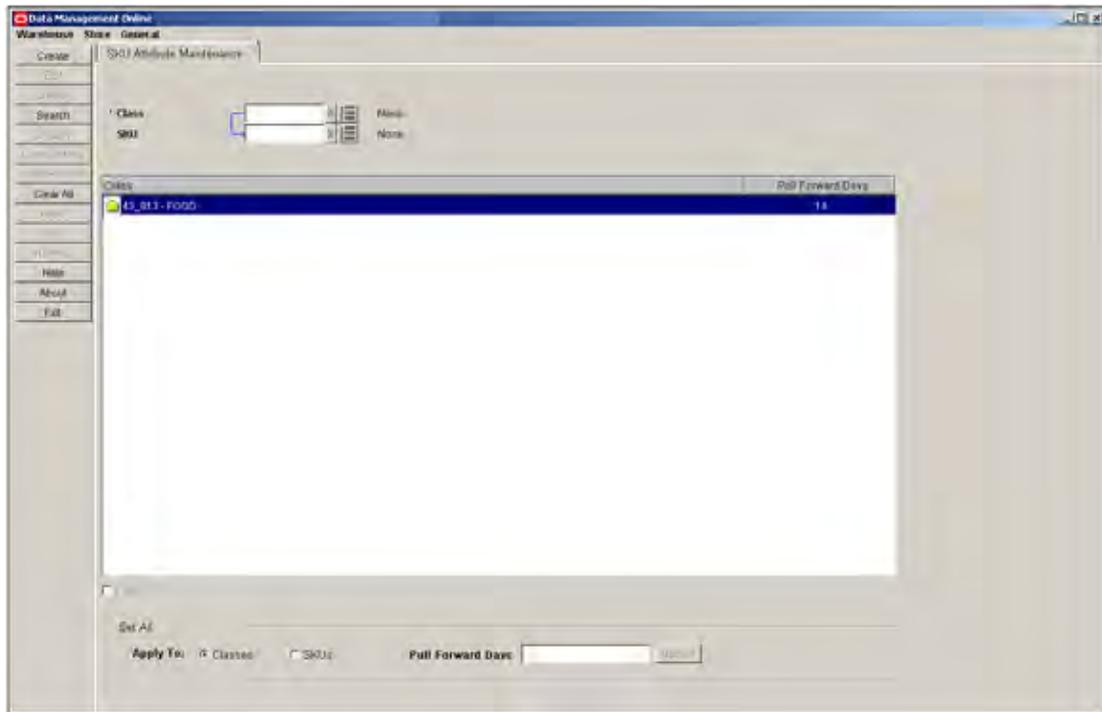
The SKU Attribute Maintenance tab allows you to enter and modify attributes of SKUs that can be set at the Class and/or SKU level.

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 quickly outweighs 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 Scaling. The SKU Attribute Maintenance tab opens.

Figure 3–30 SKU Attribute Maintenance Tab



1. 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.
2. Click **Search**. The Class area displays the Classes and their SKUs that match your criteria.

Change Values for All Displayed Classes or SKUs

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

1. Search for Classes and SKUs.
2. In the Set All area, select either Classes or SKUs.
3. 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.
4. Click **Update**. All the displayed Classes or SKUs are set to the same value with the modified rows shown in green text.
5. Click **Save**. You are prompted to confirm your decision.
6. Click **OK**.

Change Values for a Single Displayed Class or SKU

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

1. 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 occurs 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 are shown in green text.
5. Click **Save**. You are prompted to confirm your decision.
6. Click **OK**.

Data Management: Store

This chapter provides information about using Data Management for stores.

Maintain the Store Source

This section provides information on how to:

- [Perform a Mass Update of the Store Sources](#)
- [Maintain Store Source by SKU](#)
- [Maintain Store Source by Store](#)

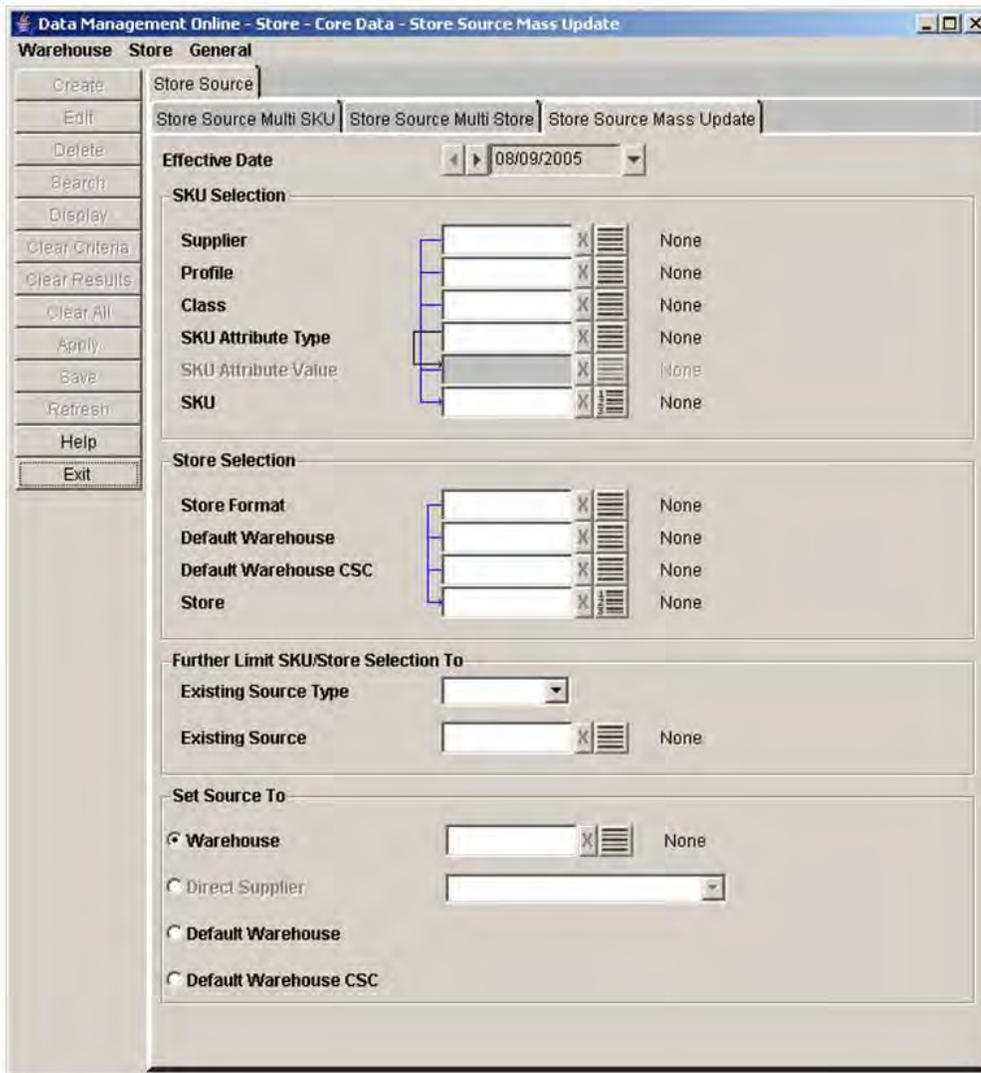
Perform a Mass Update of the Store Sources

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.

Figure 4-1 Store Source Mass Update Tab



1. In the Effective Date field, enter the date when the change occurs.
2. In the SKU Selection area, enter the criteria to be used to search for the SKUs you want to update.
3. In the Store Selection area, select the store criteria to be used 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.

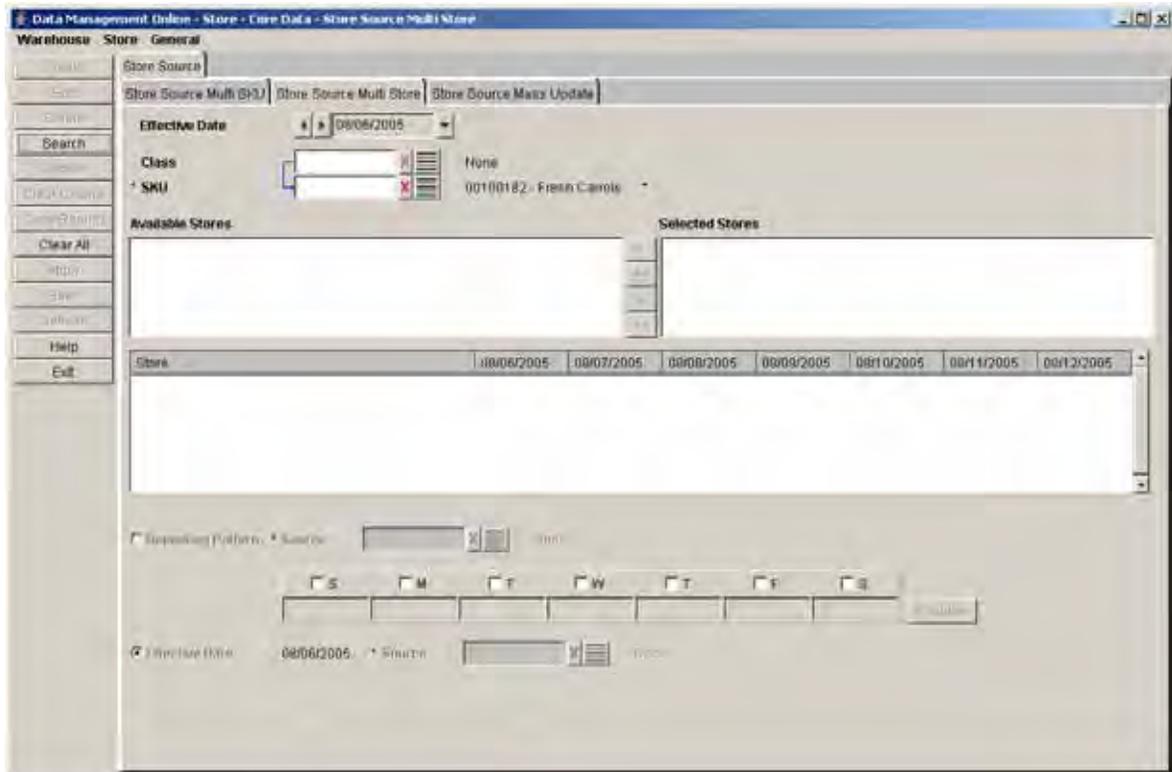
Effective Date

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.

Figure 4-2 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 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 is 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.

Figure 4–3 Store Source Multi SKU Tab

The screenshot shows the 'Store Source Multi SKU' tab in the 'Data Management Online - Store - Core Data' application. The interface includes a search sidebar on the left with buttons like 'Search', 'Display', 'Clear All', 'Help', and 'Exit'. The main area has several input fields: 'Effective Date' (08/06/2005), 'Profile' (None), 'Store Format' (None), 'Store' (000000001 - Wellington), and 'Class' (001 - Department I). Below these are two lists: 'Available SKUs' (empty) and 'Selected SKUs' (00100148 - Budget Bats Food, 00100355 - Spicy Hot Oranges). At the bottom, there is a 'Repeating Pattern' section with a 'Source' field (WT300 - Warehouse) and a table of days (S, M, T, W, T, F, S) with checkboxes. An 'Effective Date' field is also present at the bottom.

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 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 is 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

This section provides information on:

- [Define Store Defaults](#)
- [Define Store Exceptions](#)

Define Store Defaults

This section provides information on how to:

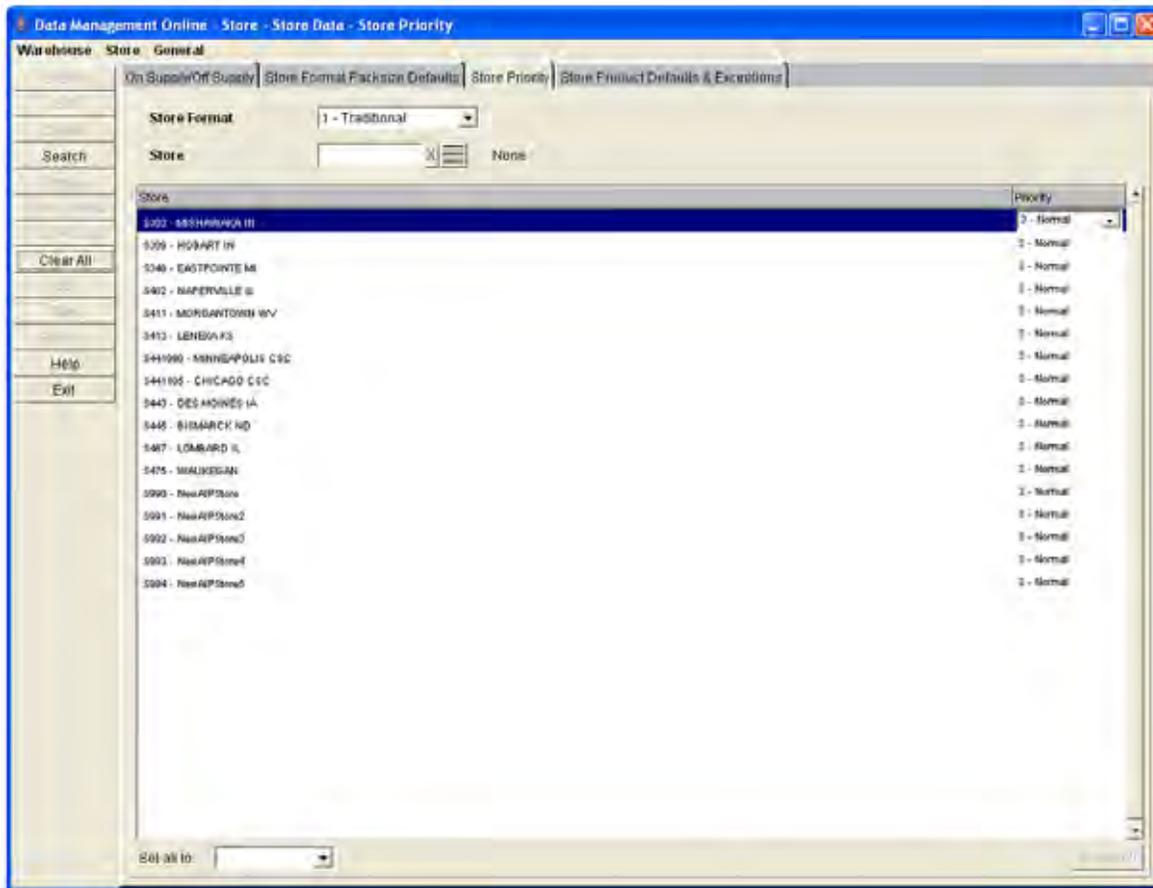
- [Define Store Priority](#)
- [Define Pack-sizes for Stores](#)
- [Maintain On Supply and Off Supply Dates for a SKU](#)
- [Define Promotion Start and End Dates](#)

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.

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

Figure 4–4 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 Pack-size Defaults primary tab, select the Direct To Store Defaults secondary tab.

Figure 4-5 Direct to Store Defaults Tab

The screenshot shows a software interface for defining store defaults. The main window title is "Data Management Online - Store - Store Data - Store Format Packsize Defaults - Direct To Store Defaults". The interface includes a left-hand menu with options like "Warehouse", "Store", "General", "Display", "Print", "Refresh", "Cancel", "Save", "Help", and "Exit". The main area has several tabs: "On Supply/Off Supply", "Store Format Packsize Defaults", "Store Priority", "Store Product Defaults & Exceptions", "Warehouse To Store Defaults", "Warehouse To Store Exceptions", "Direct To Store Defaults", and "Direct To Store Exceptions". The "Direct To Store Defaults" tab is active. It contains the following fields: "Effective Date" (with a calendar icon and the date 09/14/2), "Supplier" (with a list-of-values button and the value "None"), "Selected Store Format" (with a dropdown menu), and "New Pack Size Selection" (with a dropdown menu). Below these fields is a calendar grid for September 14-27. The grid has columns for days of the week (T, F, S, S, M, T, W, T, F, S, S, M, T) and rows for dates (14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27). The first row is labeled "1 - Traditional" and the second row is labeled "1001 - Standalone". The third row is labeled "1002 - Shopping Mall" and the fourth row is labeled "1000 - Strip Mall".

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.

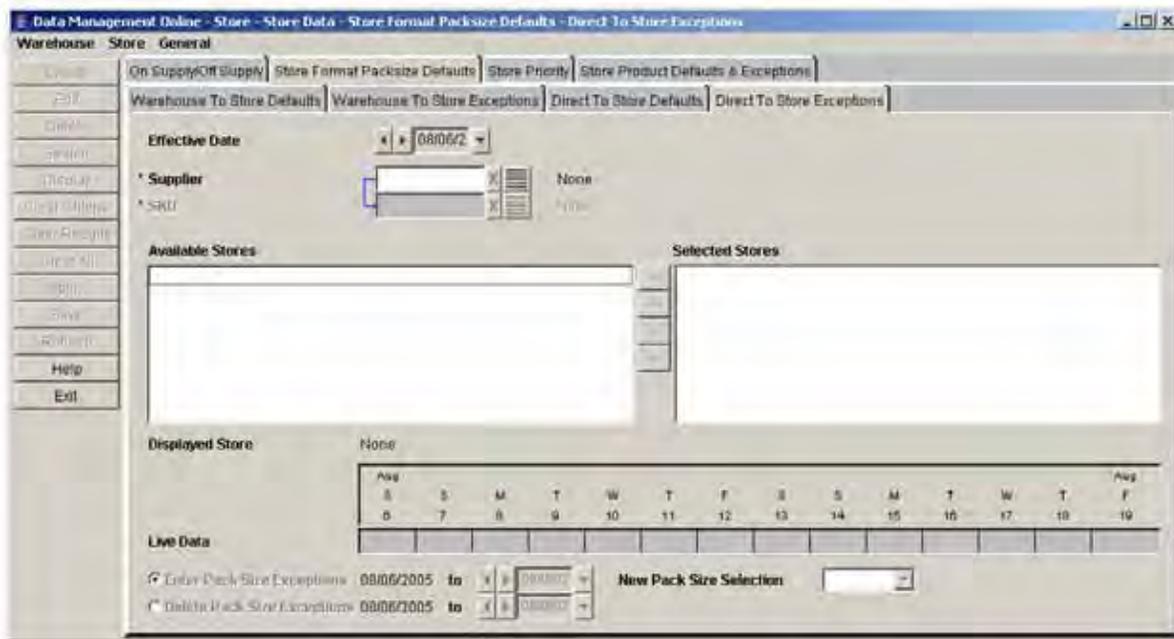
Note: The SKU-pack-sizes displayed are limited to the pack-sizes of the SKU available from the supplier.

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 Pack-size Defaults primary tab, select the Direct To Store Exceptions secondary tab.

Figure 4–6 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 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 option 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 option.
 - 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 Pack-size Defaults primary tab, select the Warehouse to Store Defaults secondary tab.

Figure 4–7 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 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.

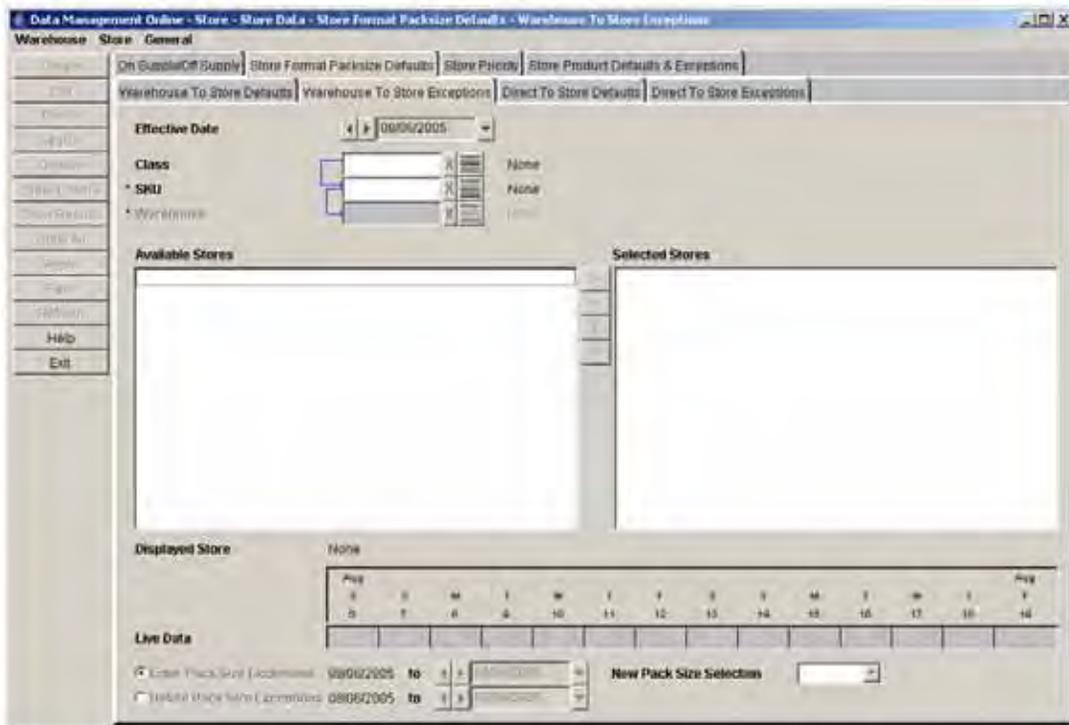
Note: The SKU-pack-sizes displayed are limited to the pack-sizes of the SKU available from the supplier.

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 Pack-size Defaults primary tab, select the Warehouse to Store Exceptions secondary tab.

Figure 4–8 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 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 option.
 - 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 option.
 - 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 goes 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.

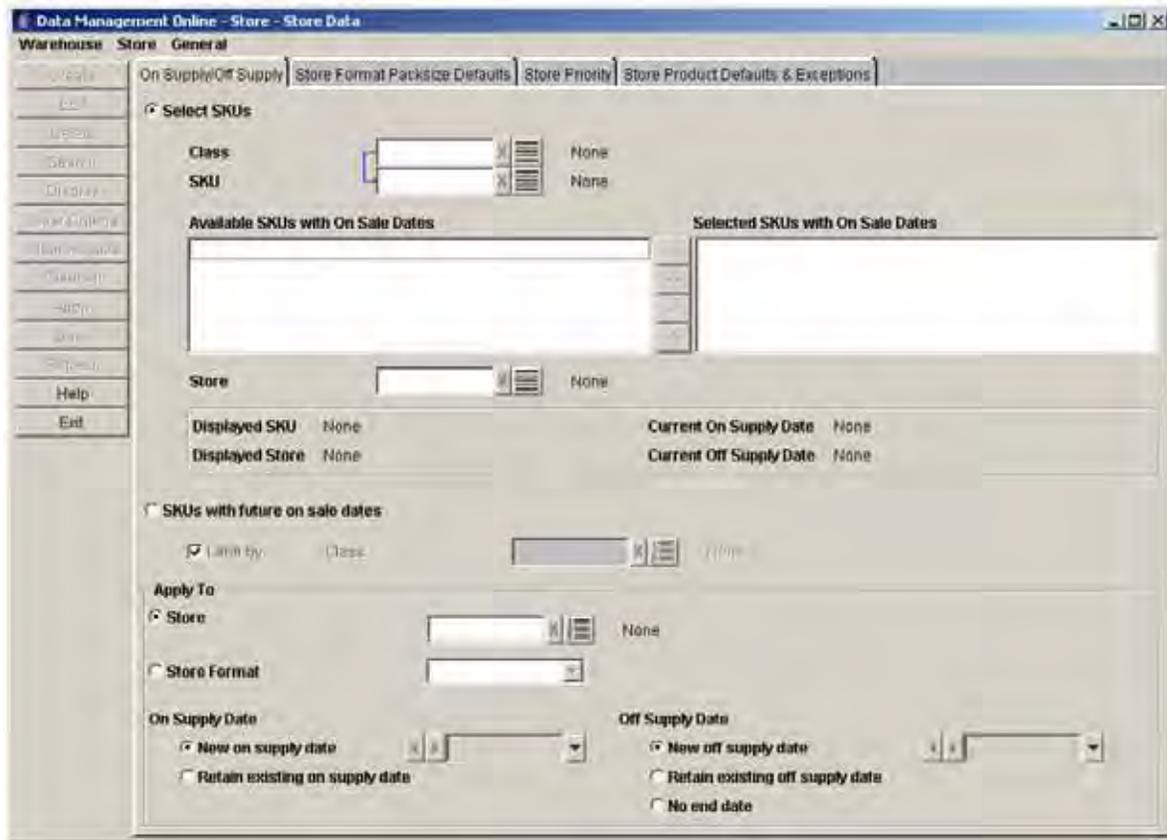
The On Supply/Off Supply tab allows you to modify the on supply/off supply dates which are initially generated in a nightly-batch process. This window also allows you to view a store's current on supply and off supply dates.

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.

Figure 4–9 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.

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

 - a. In the Apply area, select the Store Format field.
 - b. 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 for the selected locations that 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 for the selected locations that 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

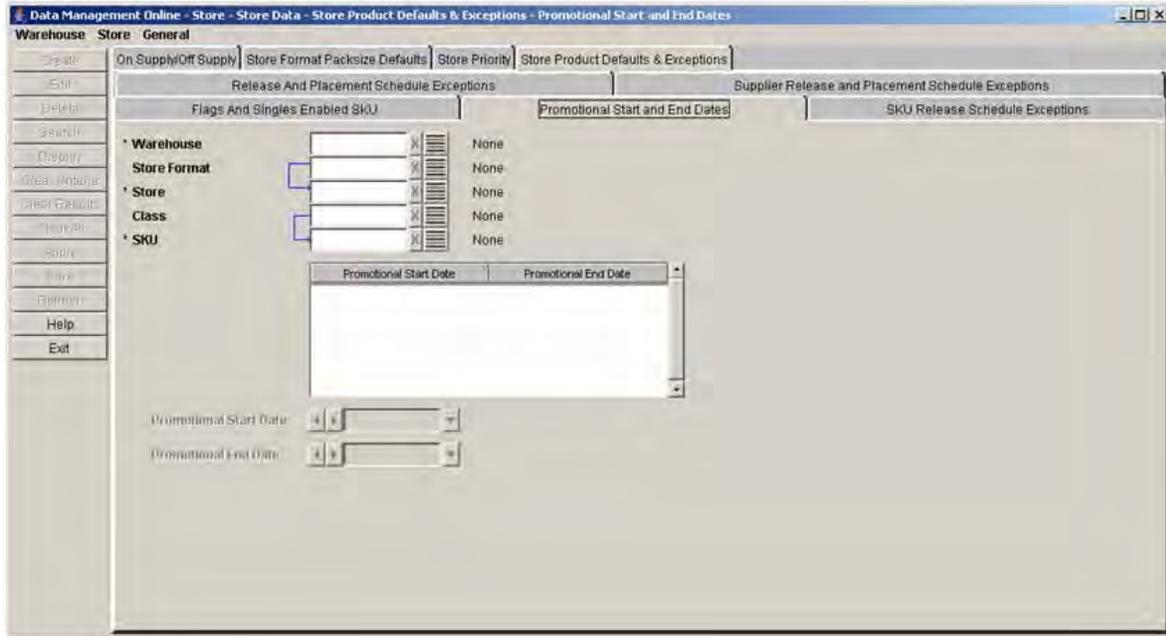
The Promotion Start and End Dates window allows you to modify promotional start and end dates for a warehouse/store/SKU combination. This information is used by Oracle Retail supply chain processing to ensure that enough stock exists in the warehouse to fulfill the expected increase in demand at the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

Figure 4–10 Promotional Start End Dates Tab



1. Enter search criteria to retrieve existing promotional exceptions.

To Select a...	Then in the...
Warehouse	Warehouse field, enter the warehouse ID or click the LOV button and select a warehouse.
Store	Store field, enter the store format ID or click the LOV button and select a store.
Class	Class field, enter the class ID or click the LOV button and select a class.
SKU	SKU field, enter the SKU ID or click the LOV button and select a SKU.

2. Click **Search**.

Update the Promotion Dates

Perform the following steps to 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

This section provides information on:

- [Maintain Exceptions to the Release and Placement Schedules](#)
- [Maintain Exceptions to the SKU Release Schedule](#)

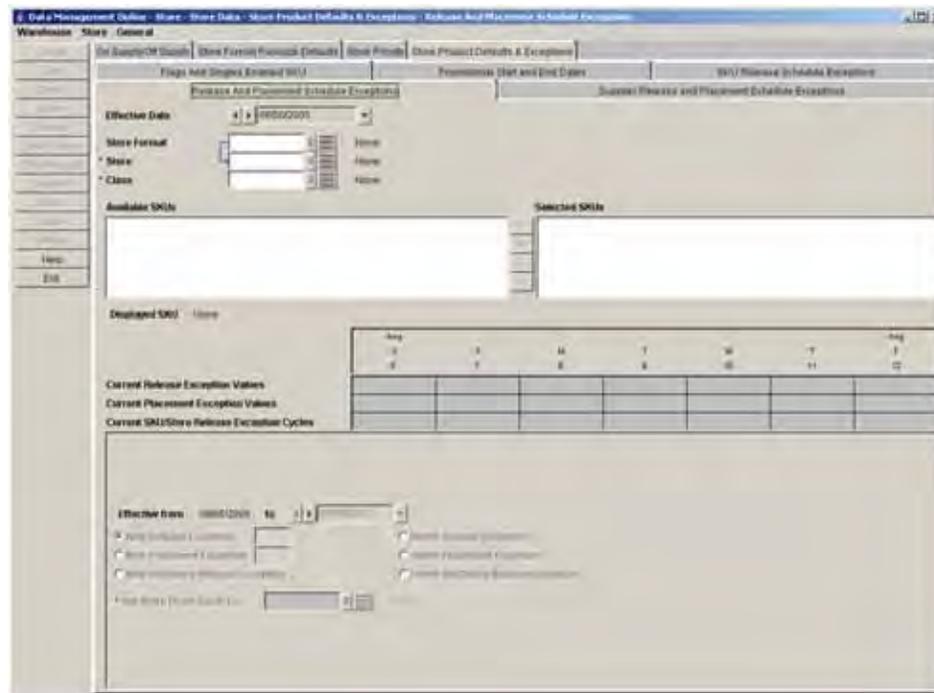
Maintain Exceptions to the Release and Placement Schedules

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.

Figure 4–11 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.

To Select a...	Then in the...
Store format	Warehouse field, enter the warehouse ID or click the LOV button and select a store format.
Store	Store field, enter the store format ID or click the LOV button and select a store.
Class	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

Perform the following steps to 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

Perform the following steps to 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

Perform the following steps to 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

Perform the following steps to 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

Perform the following steps to 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

Perform the following steps to 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 overlays 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.

Figure 4–12 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

This section provides information on:

- [Maintain Store Order Cycles](#)
- [Define Non-Release and Non-Receipt Days](#)

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 beforehand 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.

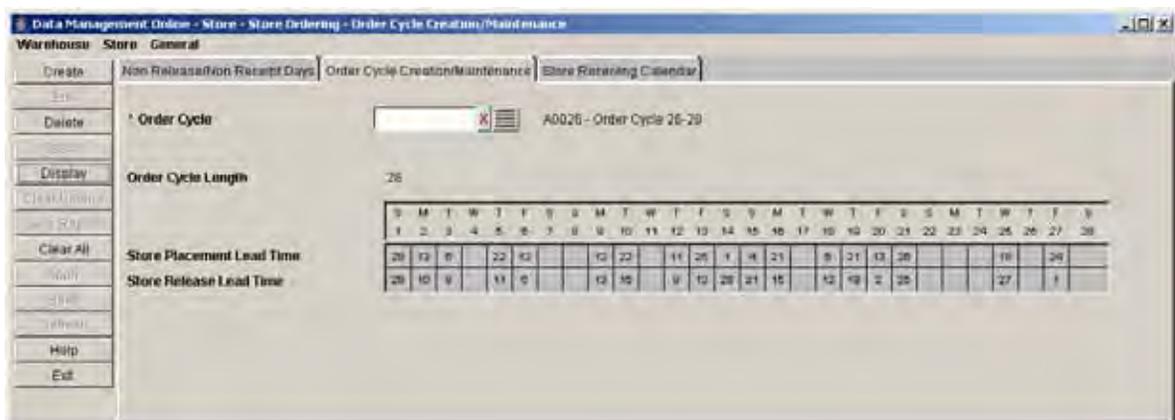
You can only create and delete store order cycles. When you create order cycles, the order cycle code must consist of five alphanumeric characters and be unique.

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 that orders into the store's source warehouse can be executed with the confidence that the orders are 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.

Figure 4–13 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.
2. 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.

1. Click **Create**. The Create Order Cycle window opens.

Figure 4–14 Create Order Cycle Window



2. In the Order Cycle Code field, enter a code for the order cycle.
 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. Enter placement lead times:
 - a. Double-click a cell in the Store Placement Lead Time row of the grid.
 - b. 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.
 - c. Press **Enter** or click away from the cell.
 6. Enter store release lead times:
 - a. Double-click a cell in the Store Release Lead Time row of the grid.
 - b. 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.
 - When you enter a store release lead time for a given day in the cycle, you 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.
-
- 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 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**.

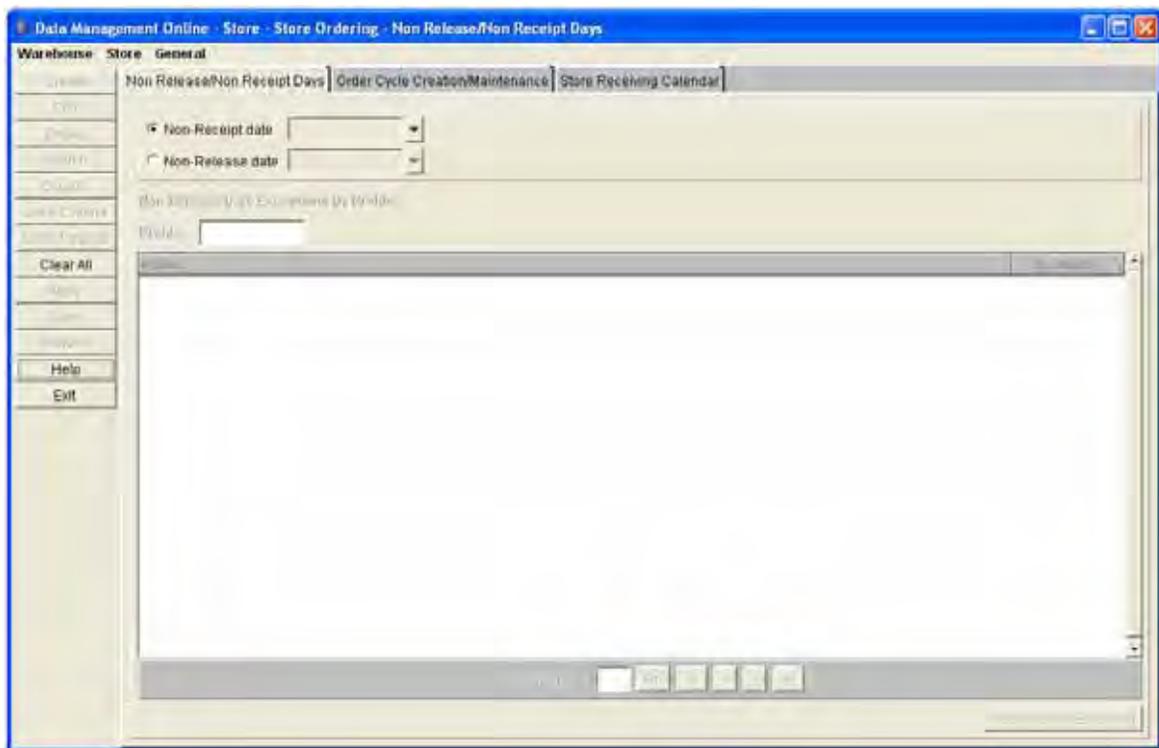
Define Non-Release and Non-Receipt Days

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 is 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.

Figure 4–15 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,

- Enter **Y** to indicate that exceptions exist.
- Enter **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**.

Data Management: Warehouse

This chapter provides information about using Data Management for warehouses.

Core Data

This section provides information on:

- [Demand Group](#)
- [Ranging](#)
- [Scheduling Location Maintenance](#)

Demand Group

This section provides information on how to:

- [Maintain Demand Groups](#)
- [Maintain Demand Group Attributes](#)

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. [Table 5-1](#) provides an example of a demand group.

Table 5-1 Demand Group Example

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 [Table 5-1](#) 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.

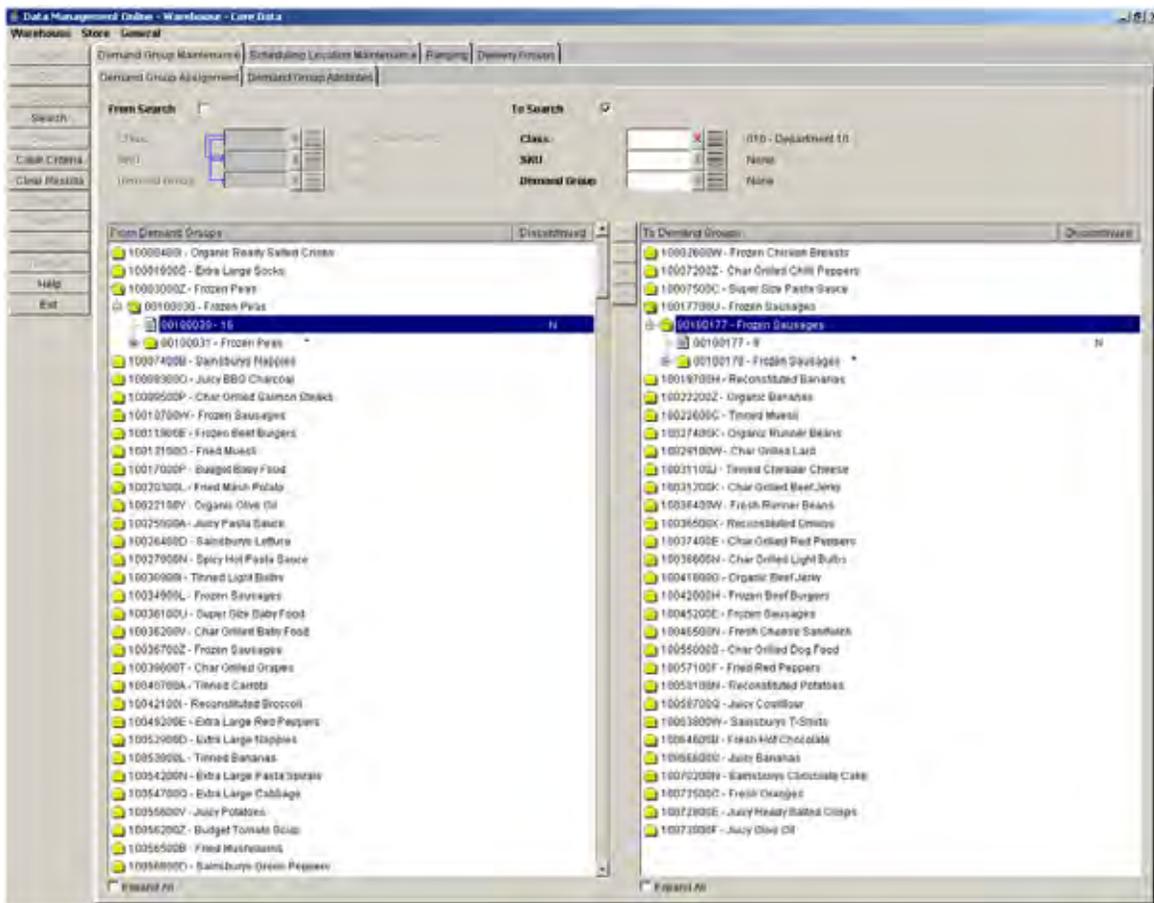
The From Demand Groups tree and To Demand Groups tree can be cleared individually if there are no unsaved changes on the screen. If the screen contains unsaved changes:

- 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.

Figure 5-1 Demand Group Assignment Tab



1. Check the From Search check box, the To Search check box, or both.

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.
 - a. Double-click the demand group and SKU folders.
 - b. Select the Expand All option for the From Demand Groups tree.
3. Select the SKU pack-sizes you want to move by performing 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 are also 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.

Figure 5–2 Create Demand Group Window

4. 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.

- a. In the Demand Group Type field, select how SKUs are ordered.
 - b. In the Demand Group Size field, select the size of the demand group.
5. Click **Save**. You are prompted to confirm your decision.
 6. 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.

Figure 5–3 Edit Demand Group Window

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

Maintain Demand Group Attributes

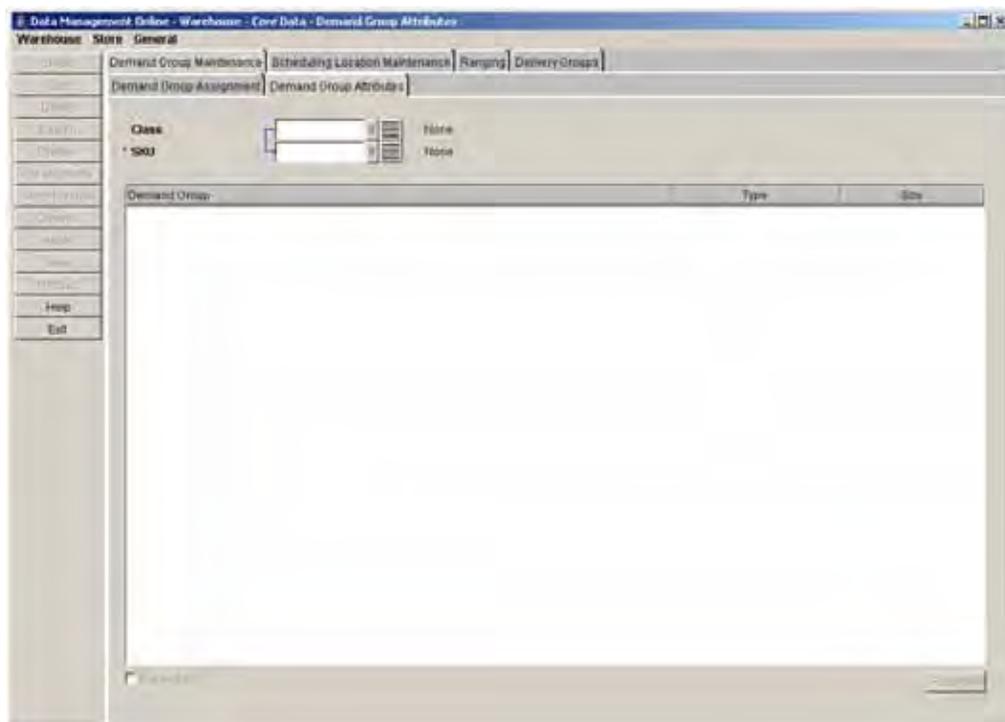
The Demand Group Attributes window allows you to select a SKU, view the demand groups that contain the SKU, and then maintain the size and type attributes for each one. Attributes determine whether pack-sizes of the same SKU across multiple demand groups can be used as substitutes for each other during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

Figure 5–4 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

This section provides information on how to:

- [Range Locations by SKU](#)
- [Range Locations by Warehouse](#)

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.

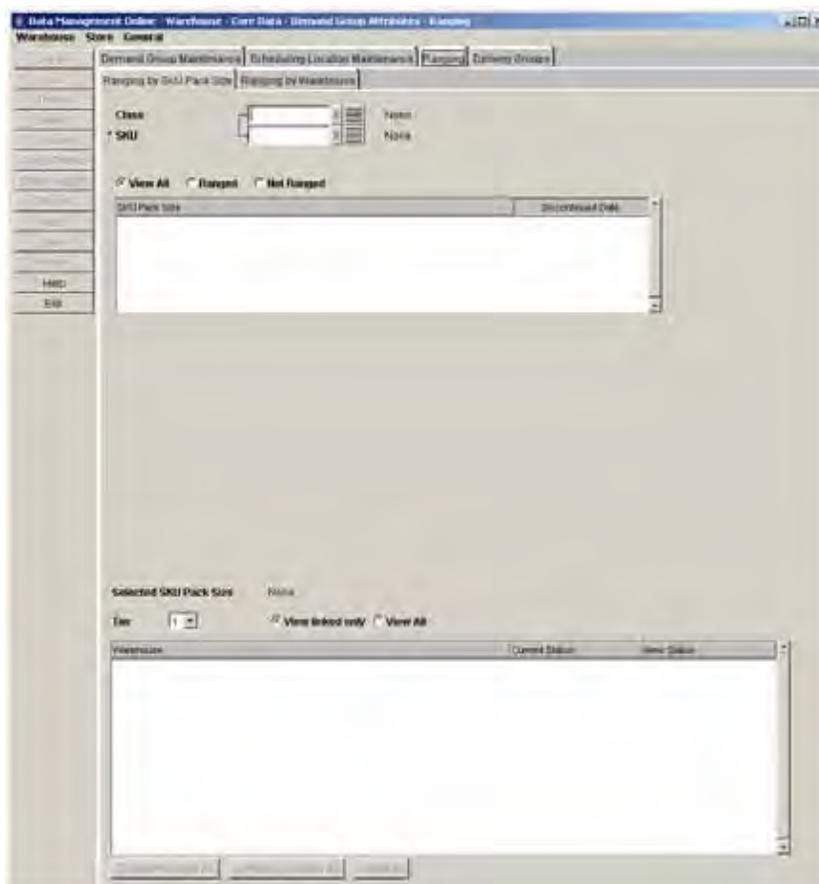
SKU packs that are ranged can exist in multiple statuses:

- **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.

Figure 5–5 Ranging By SKU Pack-size Tab



1. 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.
2. 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:
 - a. In the New Status column, select a ranging status for each warehouse you want to change.

- b. Click **Exception Range All** to set all displayed warehouses to Exception Ranged status. This only updates warehouses where the exception ranged status is valid; the status of other warehouses remain unchanged.
 - c. Click **Pending De-range All** to set all displayed warehouses to Pending De-ranged status. This only updates warehouses where the pending de-ranged status is valid; the status of other warehouses remain unchanged.
 - d. 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**.

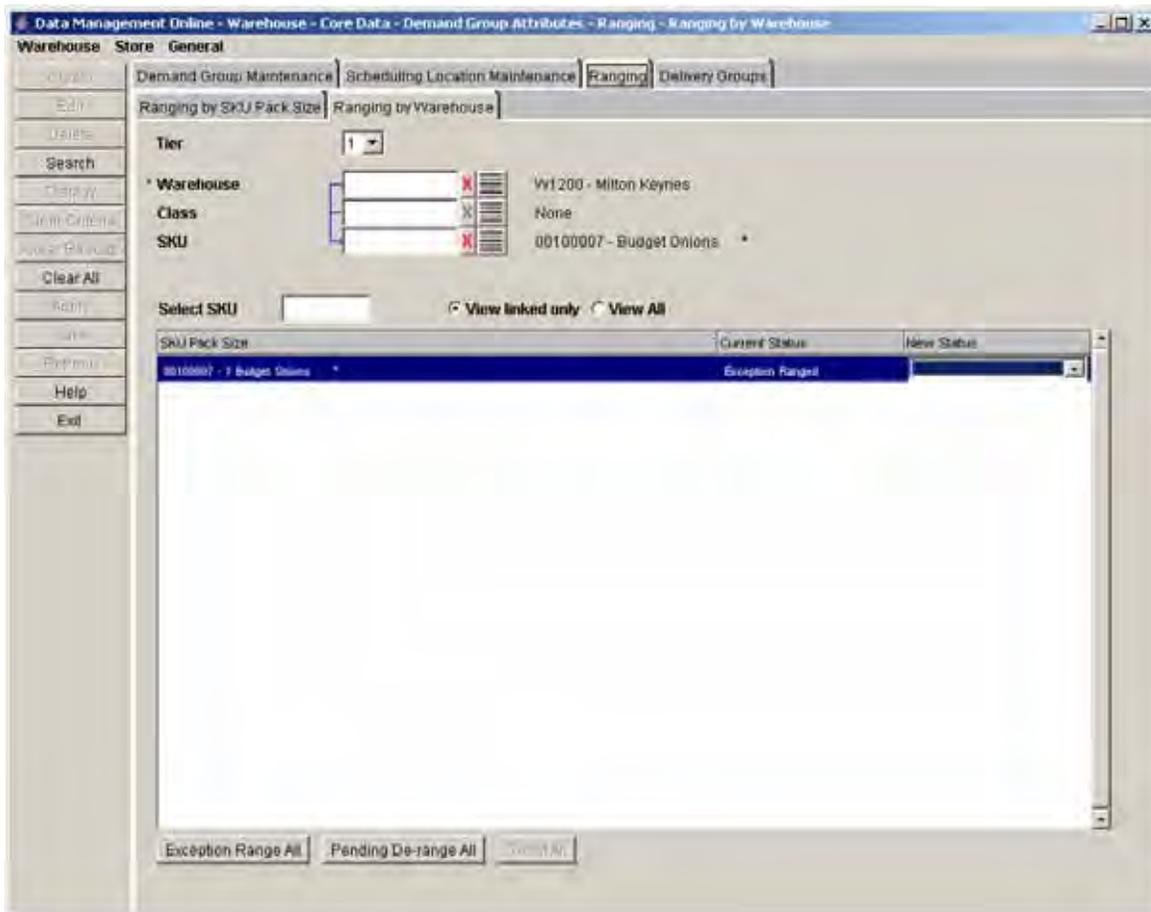
Range Locations by Warehouse

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.

Figure 5–6 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 only updates SKU pack-sizes where the exception ranged status is valid; the status of other SKU pack-sizes remains unchanged.
 - Click **Pending De-range All** to set all displayed SKU pack-sizes to **Pending De-ranged** status. This only updates SKU pack-sizes where the pending de-ranged status is valid; the status of other SKU pack-sizes 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

This section provides information on how to:

- [Create Chambers](#)
- [Maintain Chambers](#)

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.

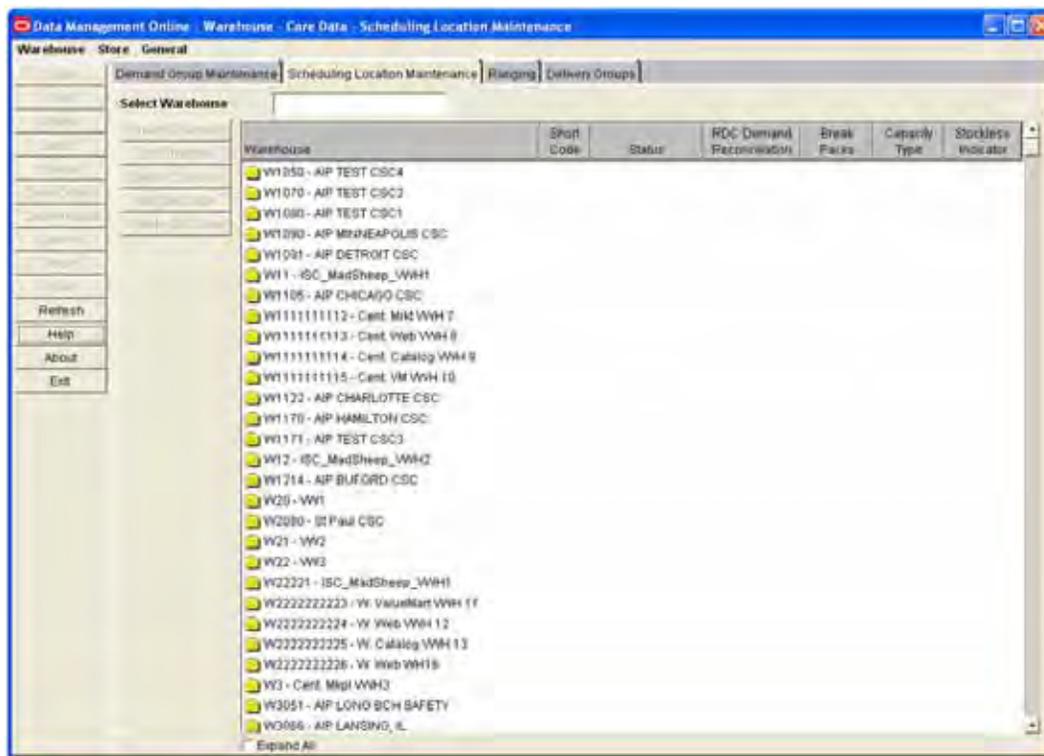
- **Break Packs Flag:** The Break Packs flag indicates that the warehouse can break packs; leaving this flag blank indicates that the warehouse cannot break packs.
- **Reconciliation Flag:** When selected, the Reconciliation Flag indicates that any store orders are reconciled with the quantities available at the chamber. For example, if the store demand is for five 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.

Figure 5–7 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 is selected and displayed 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 causes the copy to fail. The supply chain must then be completed manually.

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

Figure 5–8 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 two 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.

Figure 5–9 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 at the 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.

Chamber Status	Description
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.
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.

Chamber Status	Description
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 Chambers

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

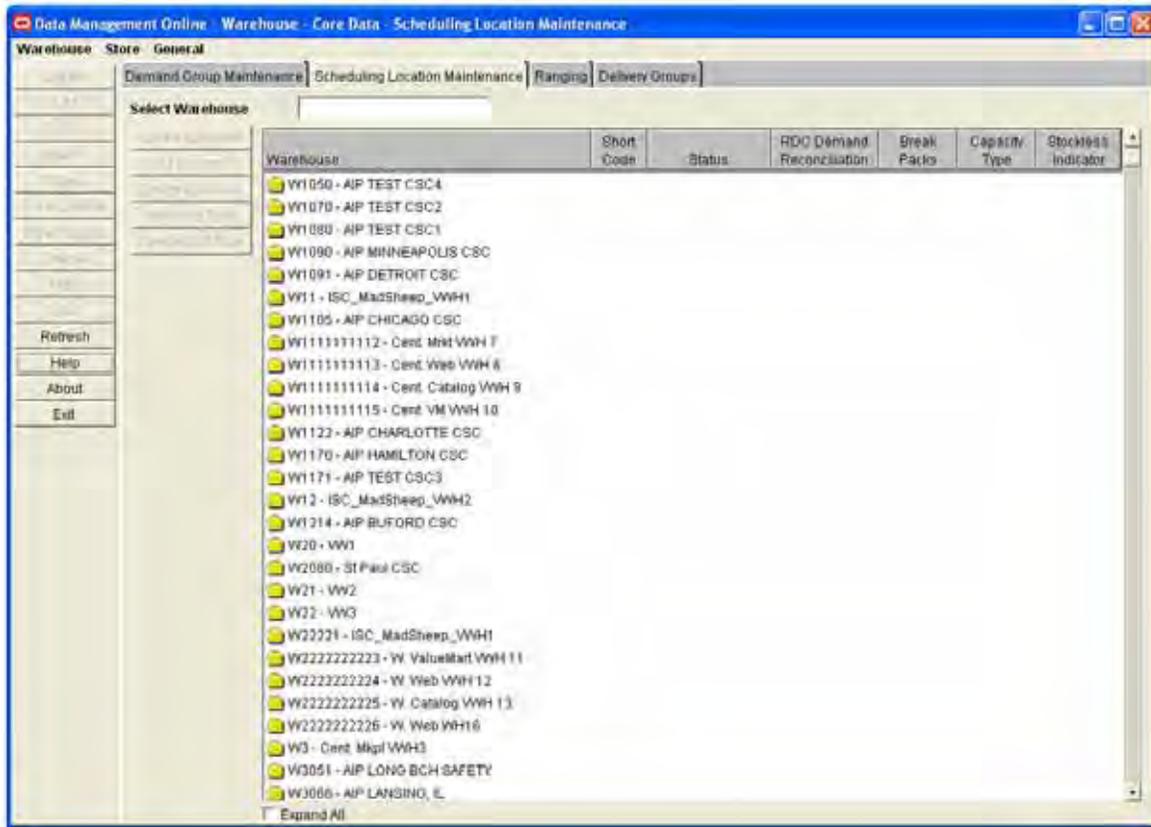
You can delete the last SKU type from a chamber only if the chamber status is New. You may add a SKU type to any warehouse chamber as long as its status is not Closed. Once you close the chamber any remaining SKU types are automatically removed.

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.

Figure 5–10 Scheduling Location Tab - Warehouse



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.

Figure 5–11 Edit Chamber Window



- b. Edit the enabled fields as necessary.
4. Click **Save**. You are prompted to confirm your decision.
5. Click **OK**.

Change the Status of a Chamber

1. Select a chamber status from the Status option. Chamber status changes are assigned in the following order:
 - New
 - WRP
 - Released
2. To set the chamber status to Release, you must change and save the status as follows:

If the Status Displays...	Then from the Status Option, Select...	And Click...
New	WRP	Save
WRP	Release	Save

Change the Reconciliation Flag for a Warehouse Chamber

To Indicate that Store Orders...	Then...
Are reconciled for the chamber	Select the Reconciliation Flag check box
Are not reconciled for the chamber	Clear the Reconciliation Flag check box

Change the Break Packs Flag for a Warehouse Chamber

If the Chamber...	Then...
Can break packs	Select the Break Packs check box
Cannot break packs	Clear the Break Packs check box

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

If...	Then...
All surplus SKUs are immediately allocated out of the warehouse	Select the Stockless Indicator option
SKUs can be stored in the warehouse from day to day	Clear the Stockless Indicator option

1. Click **Save**. You are prompted to confirm your decision.
2. 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, 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

This section provides information on:

- [Define Warehouse Defaults](#)
- [Define Warehouse Exceptions](#)

Define Warehouse Defaults

This section provides information on how to:

- [Maintain Coupled Indicators for a Warehouse](#)
- [Maintain Size and Volume Properties for a Location](#)
- [Define Supplier/SKU-Pack-size That Are Kept Together for Ordering](#)

Maintain Coupled Indicators for a Warehouse

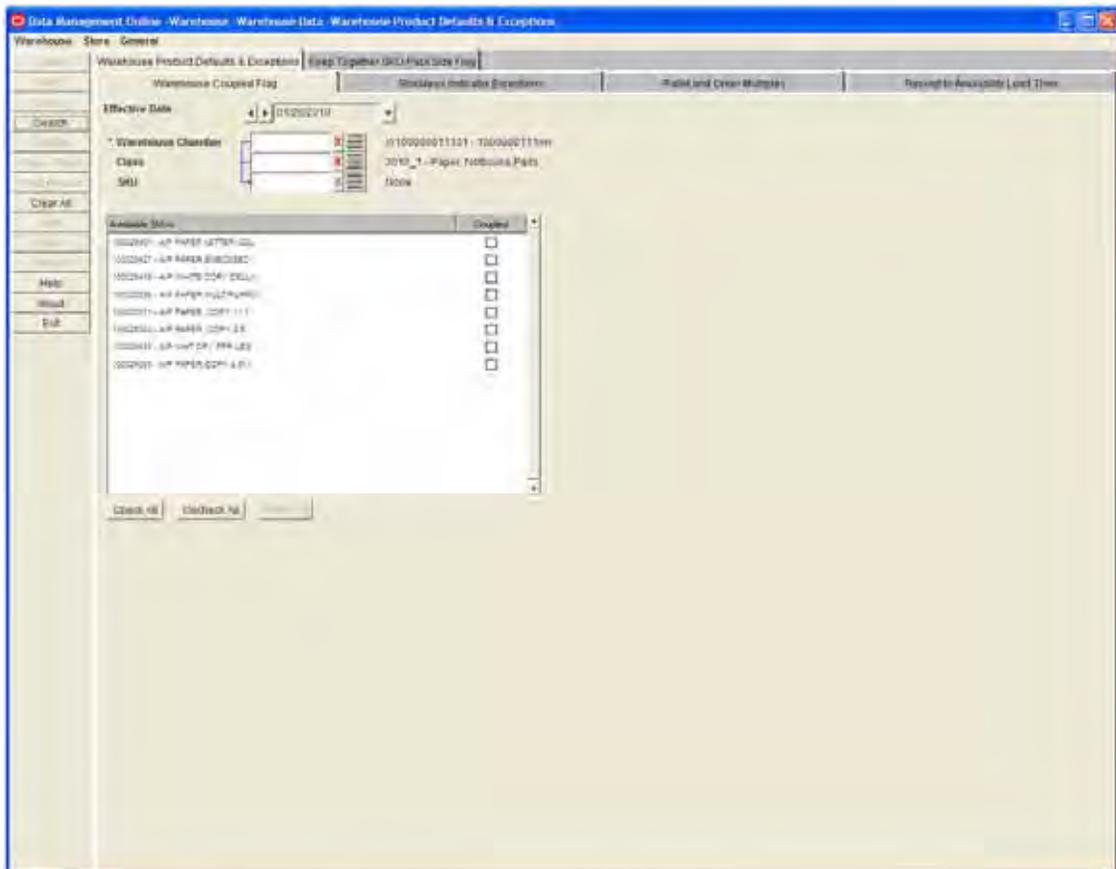
The Warehouse Couple Flag window allows you to maintain coupled indicators, which allows you to join store and warehouse orders for selected SKUs. When the store orders are coupled with the warehouse orders, the store order cannot be re-planned once the store placement lead time has been reached.

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.

Figure 5–12 Warehouse Coupled Flag Tab



- In the Effective Date field, select the date your changes become effective.
- 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.
- 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**.

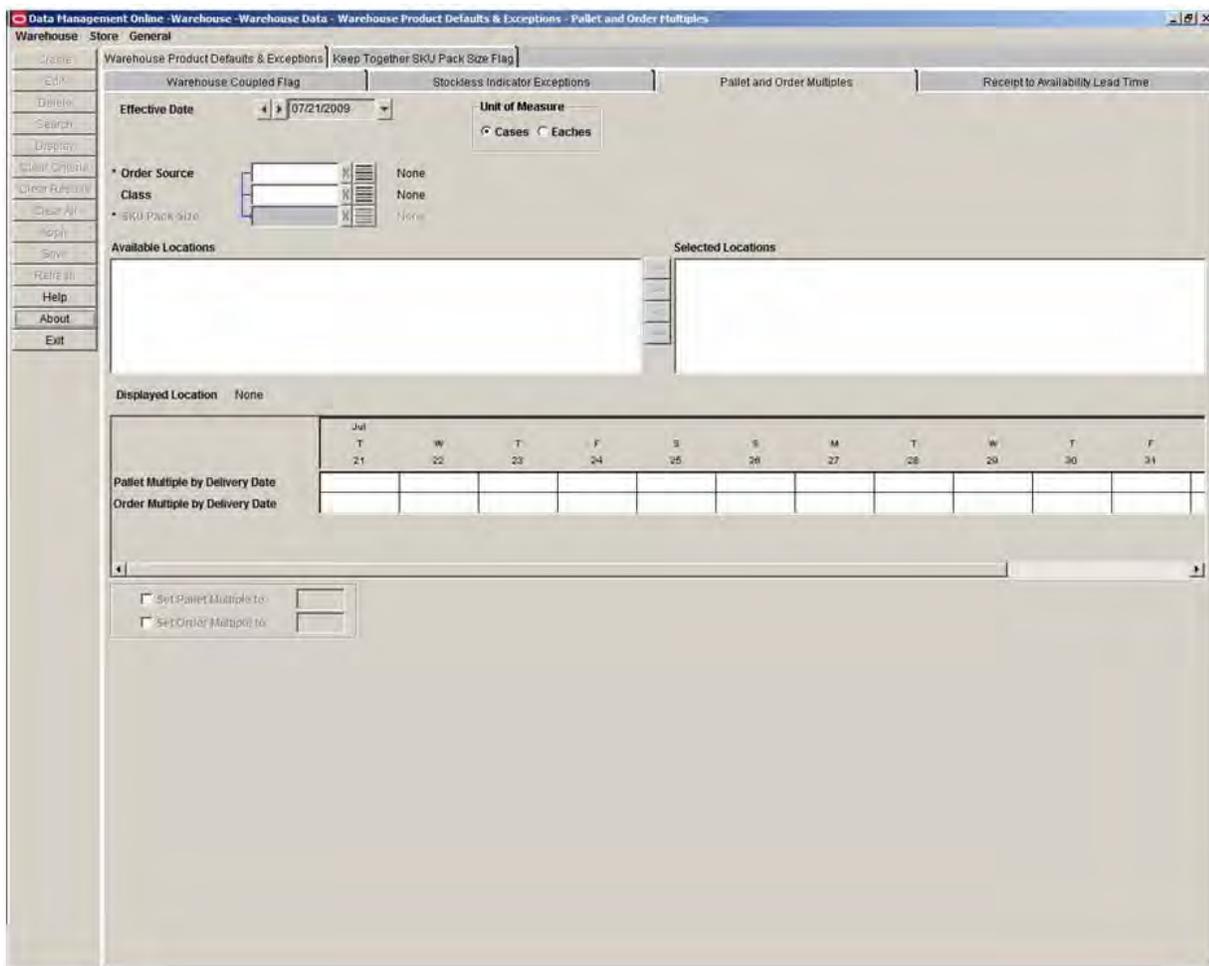
Maintain Size and Volume Properties for a Location

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.

Figure 5–13 Pallet and Order Multiples Tab - Warehouse



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 are displayed.
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 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**.

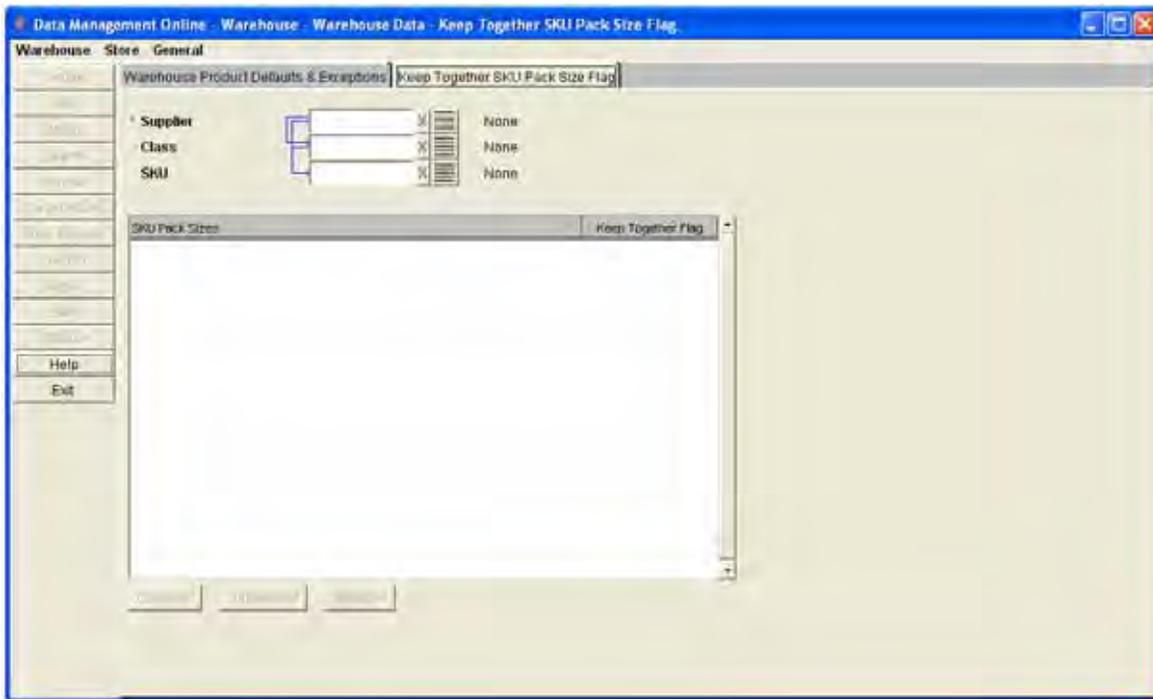
Define Supplier/SKU-Pack-size That Are Kept Together for Ordering

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.

Figure 5–14 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**.

To...	Then...
Indicate that orders are kept together during the ordering process	Select the Keep Together Flag check box next to a SKU pack-size
Indicate that orders are not kept together during the ordering process	Clear the Keep Together Flag check box next to a SKU pack-size
Set the Keep Together indicator for all available SKU pack-sizes	Click Check All
Remove the Keep Together indicator for all available SKU pack-sizes	Click Uncheck All
Set all indicators to the original values	Click Reset All

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

Define Warehouse Exceptions

This section provides information on how to:

- [Define Stockless Indicator 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.

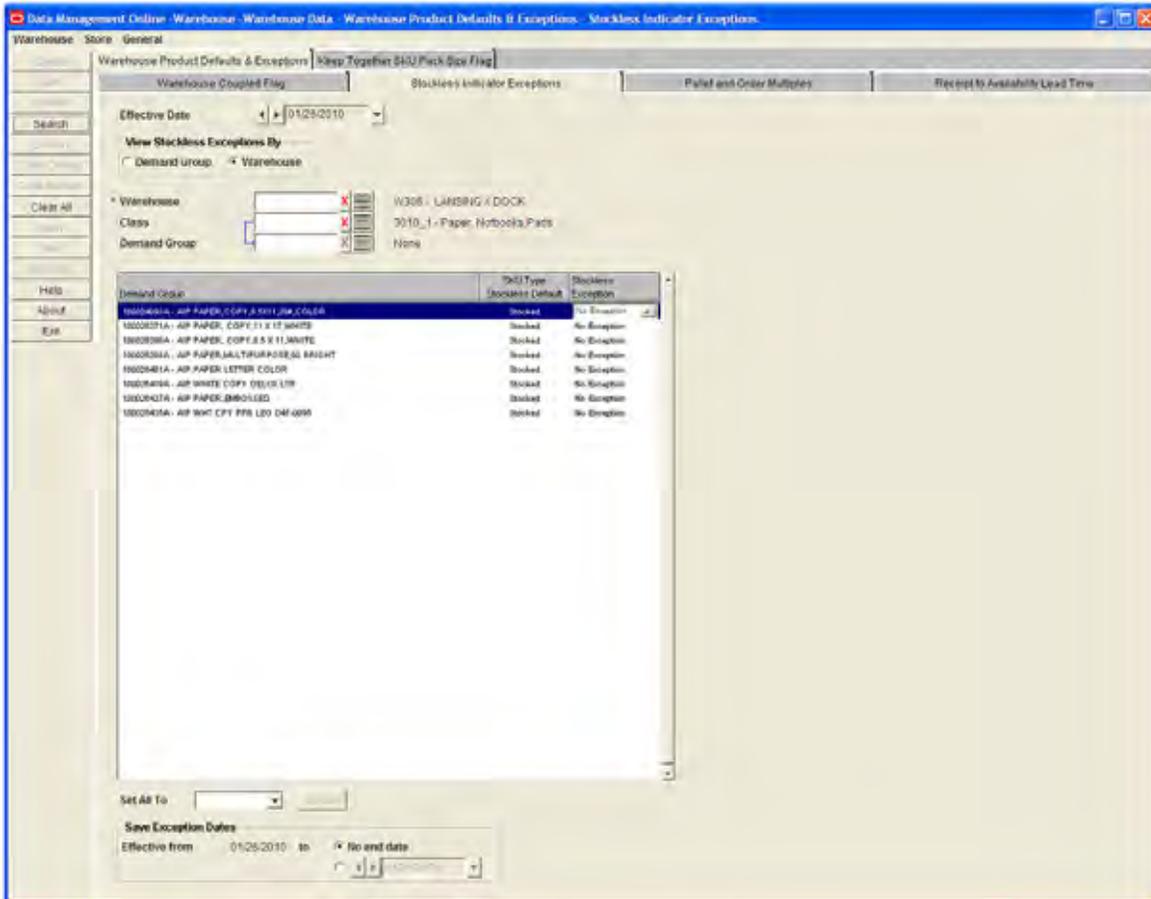
Note: Based on the AIP configuration settings for your system, the Warehouse Type drop-down list may not appear on the Stockless Indicator exceptions tab. This field is typically displayed when warehouse types are defined in your system and displays the following options:

- CS_NT, which stands for Customer Service Center-Nontraditional
 - CS_RG, which stands for Customer Service Center-Regional
 - XD_GS, which stands for Crossdock - Globally Sourced
 - XD_RG, which stands for Crossdock - 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.

Figure 5–15 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.

- In the Set All To field, select the new stockless status you want to apply.
 - 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 is 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 is used instead of the default warehouse/SKU type value.

Define the Date the Stockless Exception is Valid

1. In the To date field, either:
Select the last day the exception is effective.
or
Select **No End Date** to indicate 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

This section provides information on:

- [Order Groups](#)
- [Supplier Locks](#)
- [Define Non-Order/Non-Delivery Days](#)
- [Maintain Order Cycles](#)
- [Select the Default Orderable Unit for a Warehouse](#)
- [Time Balanced Order Source Splits](#)
- [Secondary Sources](#)

Order Groups

This section provides information on how to:

- [Create Order Groups](#)
- [Edit Order Groups](#)

Create Order Groups

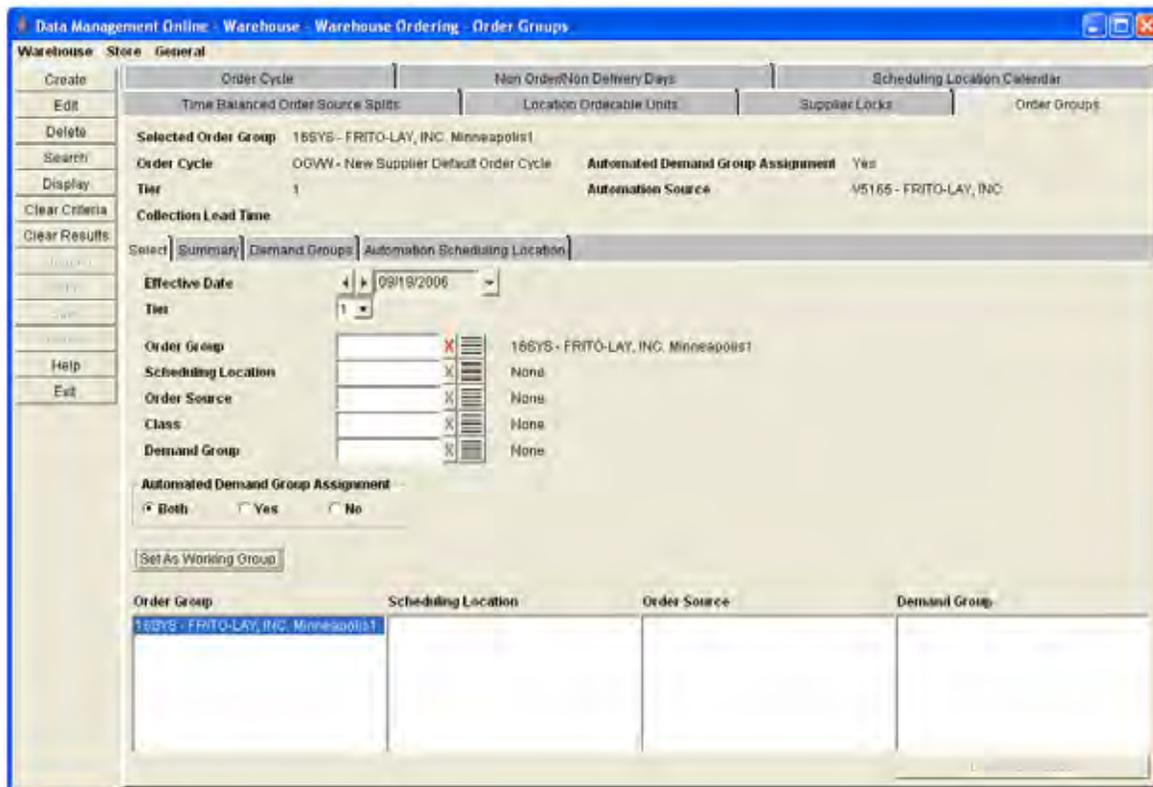
Order groups are used to group source demand groups together to enable more efficient maintenance of ordering lead times within the supply chain. Order groups are only used at the chamber level. They are not used for store ordering. By using order groups, you can put all the source demand groups that 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.

Figure 5–16 Order Groups Tab



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

Figure 5–17 Create Order Group Window

Order Cycle	Collection Lead Time
A0000 - Order Cycle 20x25	25
B0107 - Order Cycle 7x21	21
B2707 - Order Cycle 7x0	0
C0020 - Order Cycle 20x25	25
C2020 - Order Cycle 20x22	22
D0020 - Order Cycle 20x18	18

2. In the Order Group Code field, enter a unique five-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 is 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 is not 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: 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.

Tab	Description
Summary	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	The Demand Groups tab allows you to edit the order group and create assignments for the working group.
Automation Scheduling Location	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 are automatically assigned to an Order Group Demand Group Assignment. Scheduling locations are warehouse chambers that 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: 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 the other 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 the current 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.

Figure 5–18 Order Groups Tab - Warehouse

1. In the Effective Date field, select the date from when your changes become effective.
2. Enter additional criteria to retrieve an order group.

Criteria	Description
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	<p>Select the following option to limit or expand the search results displayed.</p> <ul style="list-style-type: none"> ■ Both: Returns all matching search results regardless of whether they are assigned to an order group with automated demand group assignments enabled or unavailable. ■ 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 unavailable.

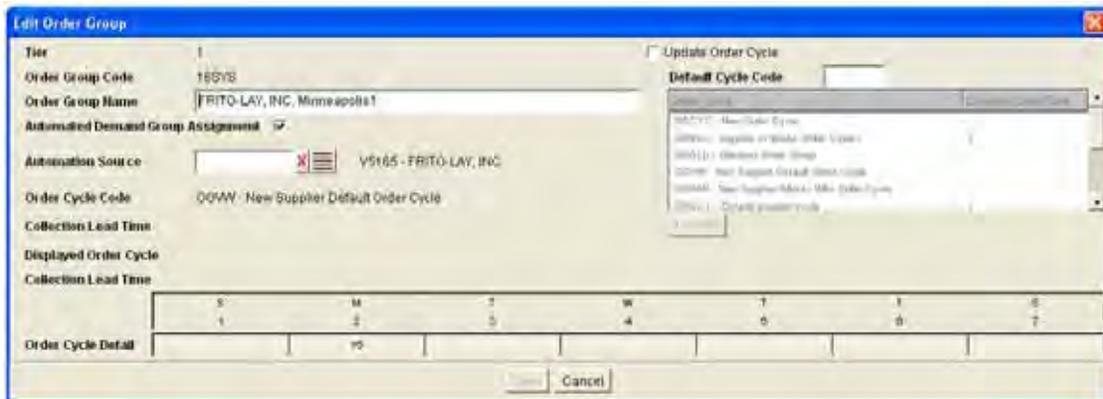
3. Click **Search**.
4. In the Order Group column, select the order group you want to edit or view.
5. Click **Set As Working Group**.

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.

Figure 5–19 Edit Order Group Window



3. In the Order Group Name field, enter the new name.
4. De-select the Automated Demand Group assignment option if you want to remove the Automated Demand Group Assignment, which removes any automation scheduling locations from the order group.
 If you want to change an order group to 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.
6. Click **Save**. You are prompted to confirm your decision.
7. 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 is 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.

Figure 5–20 Summary Tab

The screenshot shows the 'Summary' tab of the 'Order Groups' window. Key fields include:

- Selected Order Group:** 16SYS - FRITO-LAY, INC. Minneapolis1
- Order Cycle:** OGWW - New Supplier Default Order Cycle
- Tier:** 1
- Collection Lead Time:** (empty)
- Automated Demand Group Assignment:** Yes
- Automation Source:** V5165 - FRITO-LAY, INC.
- Effective Date:** 09/19/2006

The 'Order Cycle Detail' section features a calendar grid for September 2006. The grid shows days of the week (T, W, T, F, S, S, M, T, W, T, F, S, S, M, T, W, T, F, S, S, M) and dates (16, 15, 15, 15). Below the calendar, there are three columns for 'Order Source', 'Scheduling Location', and 'Demand Group'. The 'Order Source' column contains 'V5165 - FRITO-LAY, INC.', the 'Scheduling Location' column contains 'W109001 - Minneapolis1', and the 'Demand Group' column is empty.

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.

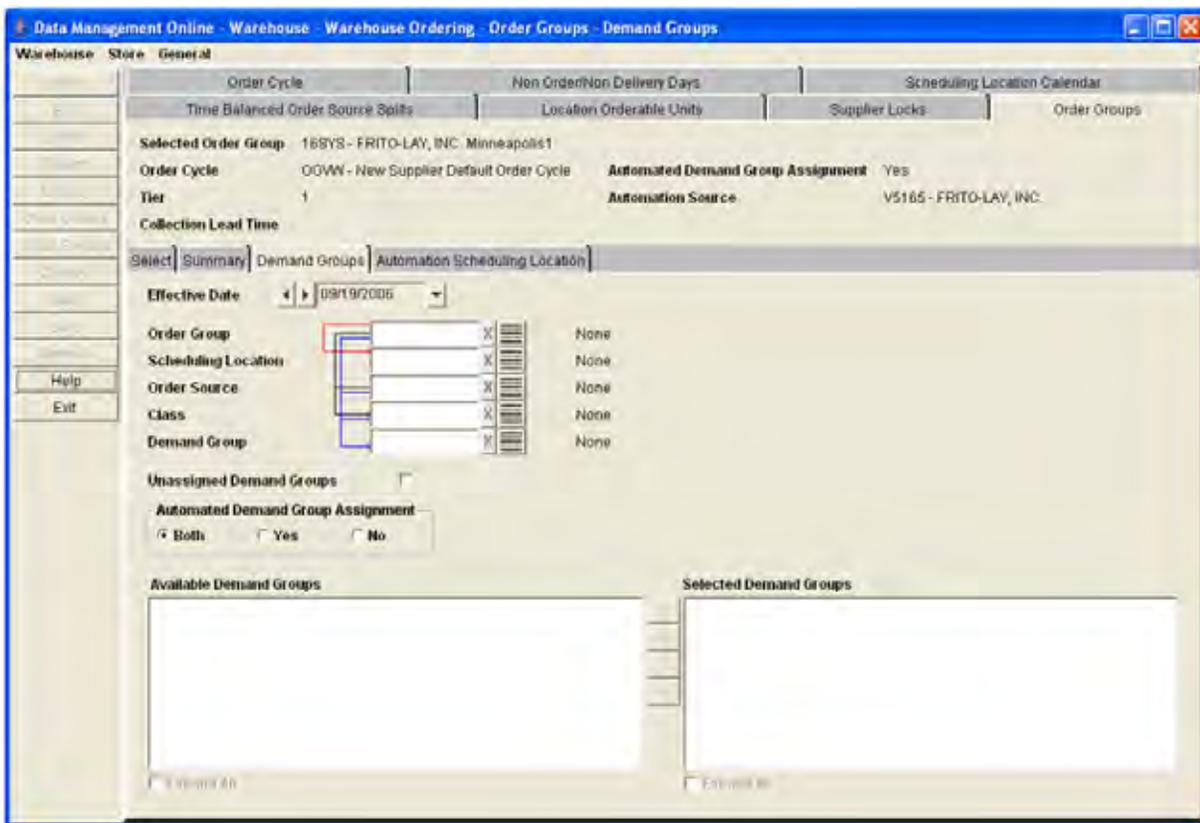
5. Click **Demand Groups** to display a list of demand groups limited by selections in the Supplier and Scheduling Location lists.

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.

Figure 5–21 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.

Criteria	Description
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.

Criteria	Description
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 filters 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: <ul style="list-style-type: none"> ▪ Both: Returns all matching search results regardless of whether they are assigned to an order group with automated demand group assignments enabled or unavailable. ▪ 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 unavailable.

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**.

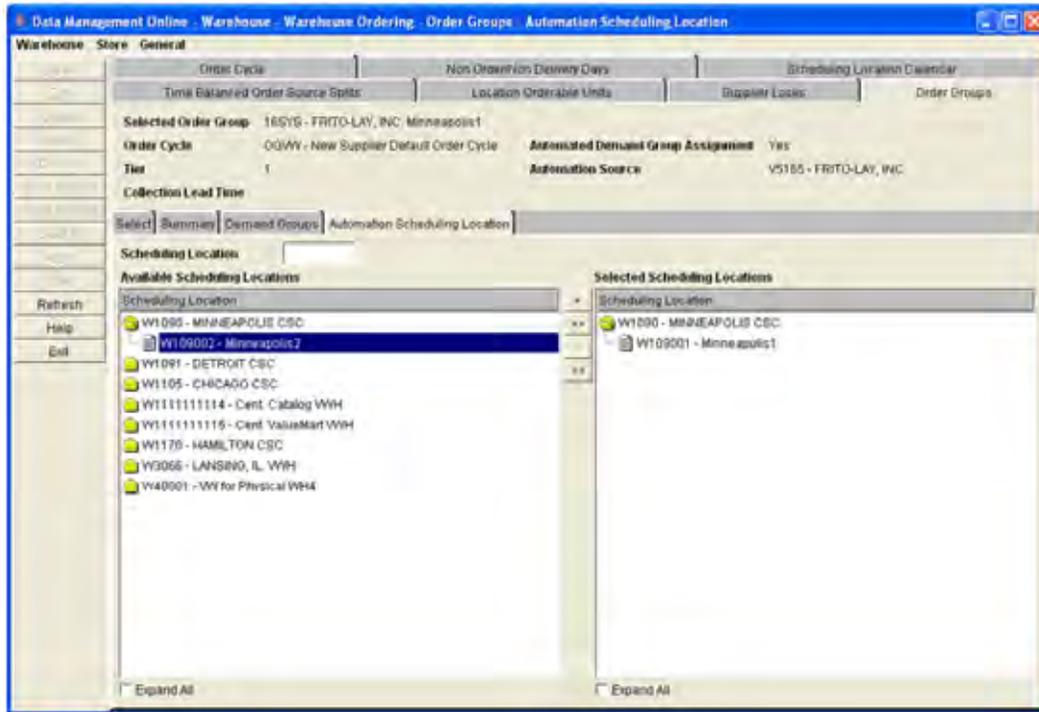
Assign the Automation Scheduling Location to an Order Group

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.

Figure 5–22 Automation Scheduling Location Tab



Note: The Automation Scheduling Location tab is only enabled 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**.

Supplier Locks

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. 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 it.

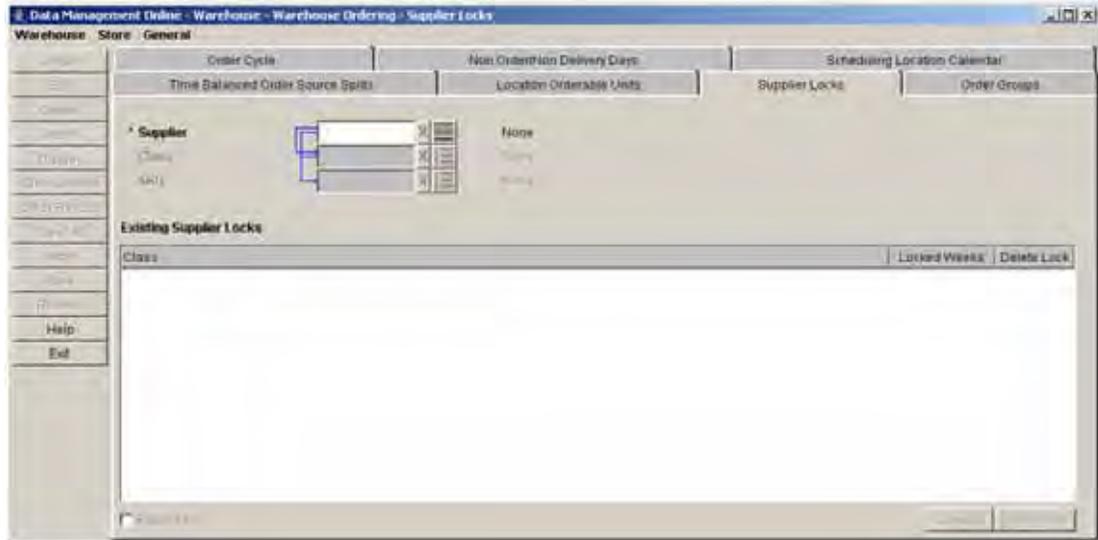
Supplier locks are entered at two levels:

Level	Description
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 locks take precedence over those at the class level.

Create a Supplier Lock

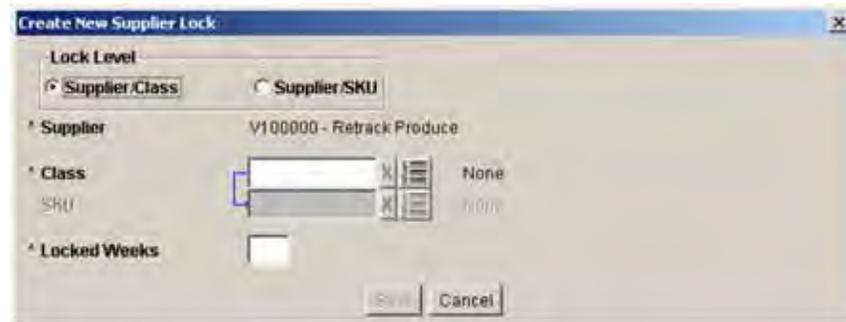
Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Ordering. Select the Supplier Locks tab.

Figure 5–23 *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.

Figure 5–24 *Create New Supplier Lock Window*



3. In the Lock Level area, select the level at which 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**.

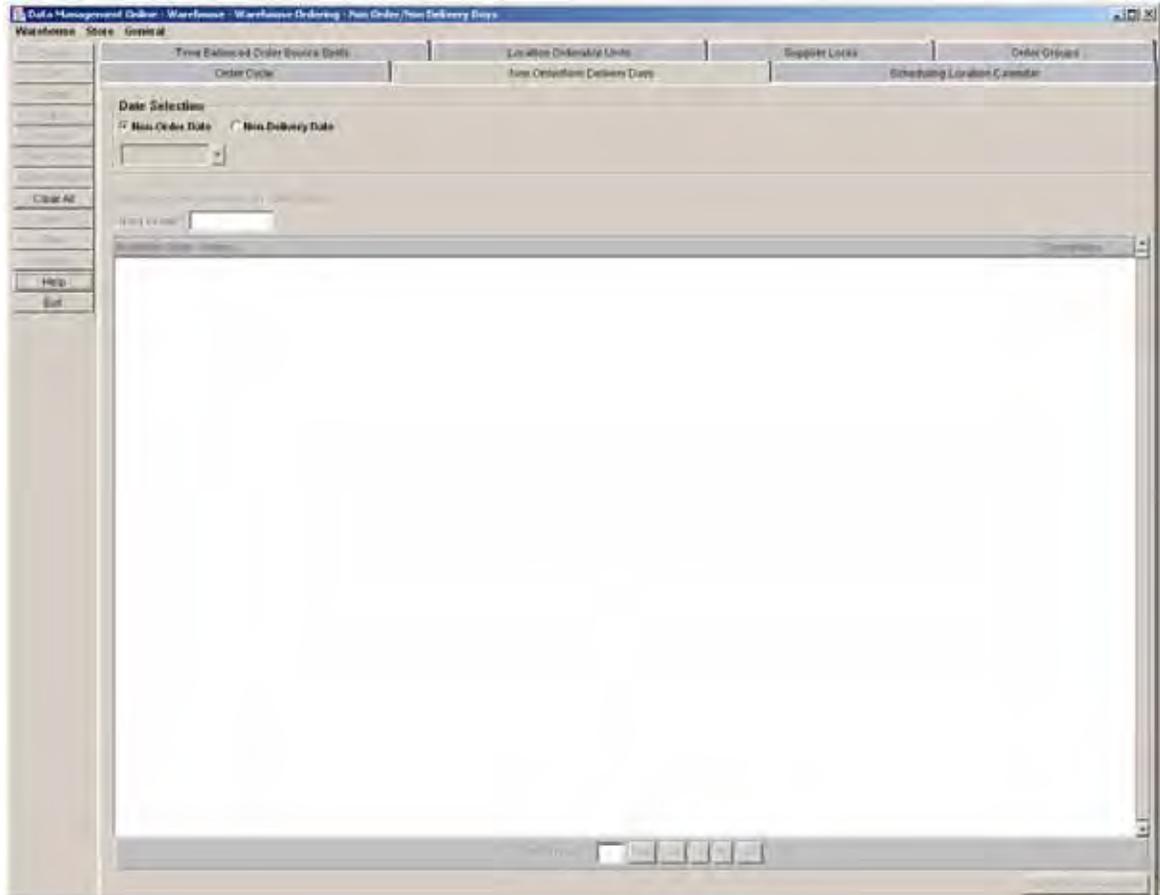
Define Non-Order/Non-Delivery Days

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 is ordered from a source. You create a non-delivery day to indicate that for that particular day, no product is received at the warehouse. Additionally, you can create exceptions by order group for non order dates and 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.

Figure 5–25 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**.

To...	Then...
Indicate that SKU-packs in that order group can be ordered	Select Y from the Exceptions list next to an order group.
Indicate that SKU-packs in that order group can be ordered	Select N from the Exceptions list next to an order group.
Remove the exceptions for all available order groups	Click Set All to No Exception .
Set all the exception indicators to their original value	Click Search .

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.

1. Select Non-Delivery Date.

2. 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.

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

4. Click **OK**.

Create or Delete an 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**.

To...	Then...
Indicate that SKU-packs in that order group can be received	Select Y from the Exceptions list next to an order group.
Indicate that SKU-packs in that order group cannot be received	Select N from the Exceptions list next to an order group.
Remove the exceptions for all available order groups	Click Set All to No Exception .
Set all the exception indicators to their original value	Click Search .

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

4. Click **OK**.

Maintain Order Cycles

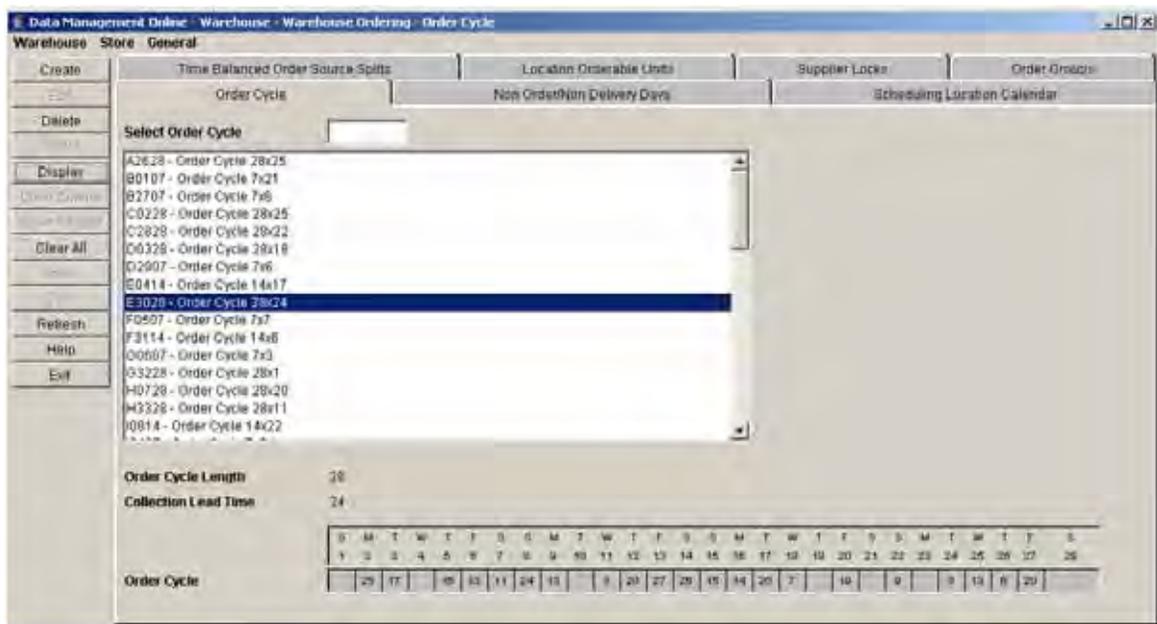
The Order Cycle window allows you to define the amount of time a source needs to deliver SKUs to the next location in the supply chain. Order lead times may not be less than zero. A zero lead time represents same day, continuous replenishment. On any given day, an order lead time may be blank, representing 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.

Figure 5–26 Order Cycle Tab



1. 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.
2. Click **Display**.

Create an Order Cycle

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

1. Click **Create**. The Create Order Cycle window opens.

Figure 5–27 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.

Figure 5–28 Location Orderable Units Tab

1. In the Effective Date field, select the date from which your changes become effective.
2. Enter additional criteria to retrieve a delivery group.

Criteria	Description
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.

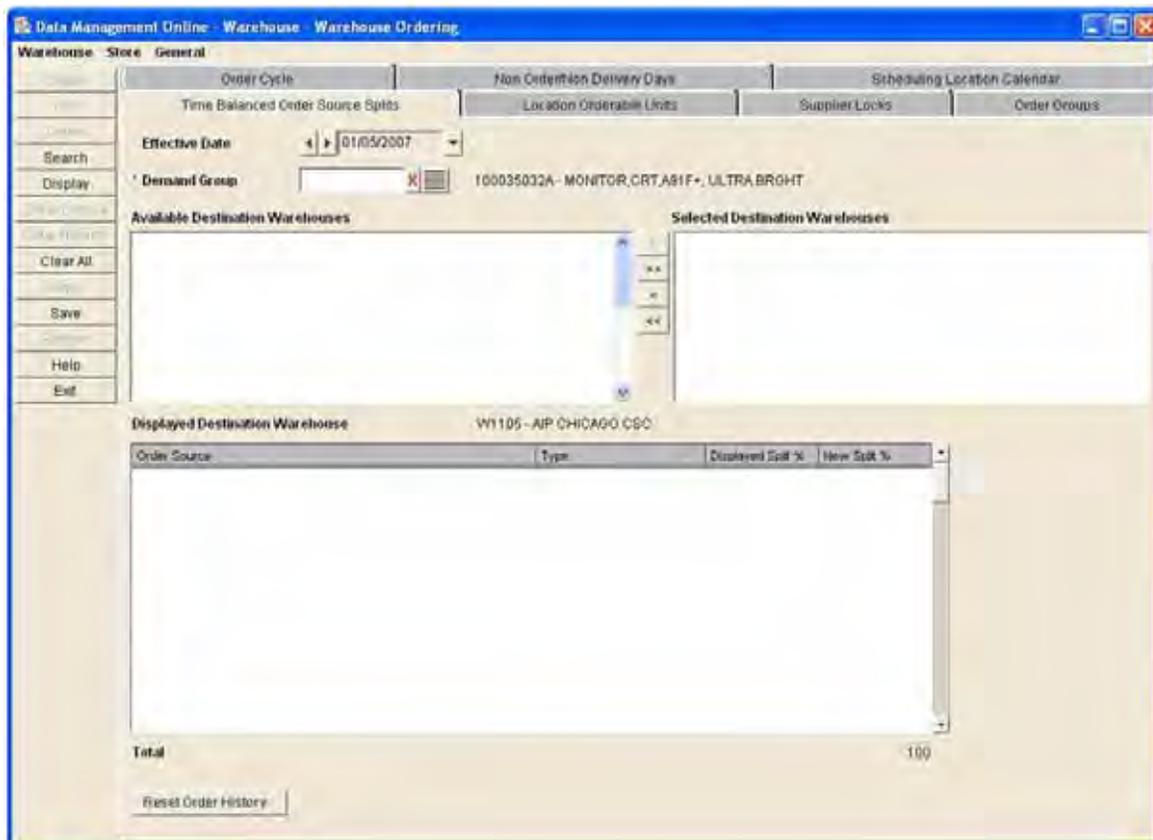
SKUs in demand groups can be supplied to a warehouse by another warehouse or a supplier. When multiple sources exist, the order quantity generated is divided across the sources. DM online uses time balanced order source split to determine how orders are divided across sources.

When you enter percentages for each source, the percentages indicate that from the effective date onwards, the entered percentages of volume are 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.

Figure 5–29 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 you 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 warehouses 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.

1. 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.
2. Click **Search**.
3. Move a Destination Warehouse from the Available Destination Warehouses area to the Selected Destination Warehouse area.
4. 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, **Reset Order History** is unavailable.

5. Click **OK**. You are prompted to confirm your decision to clear the history.
6. 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.

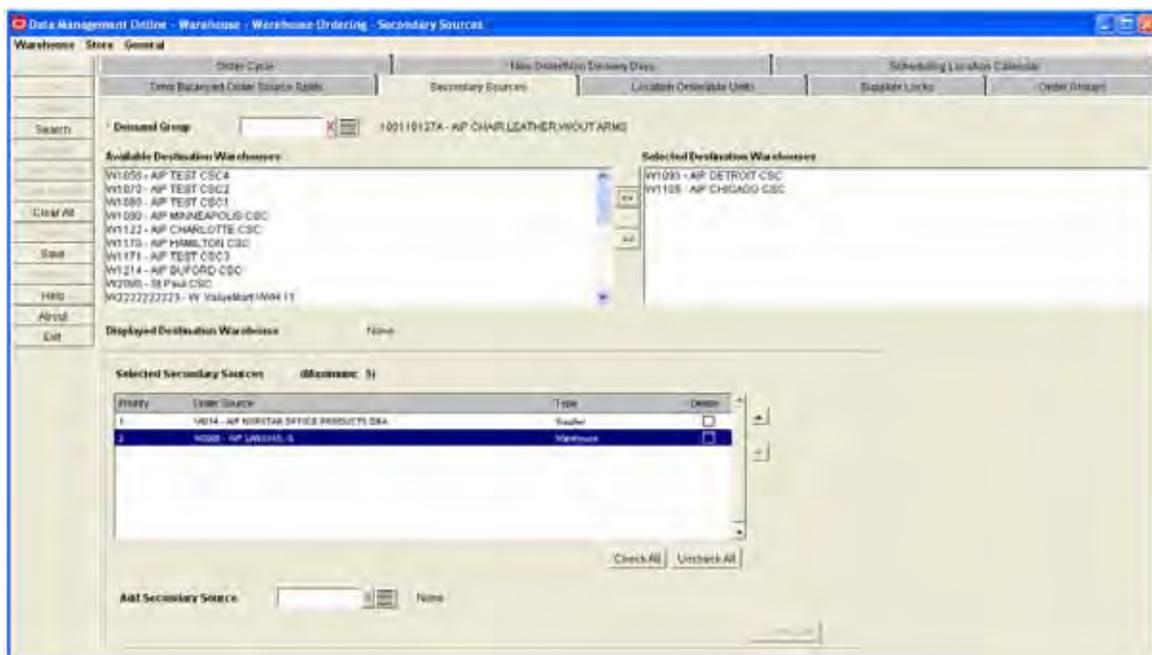
The Secondary Sources tab allows you to maintain a prioritized list of alternate sources by Demand Group/Destination warehouse. This list is used whenever a shortage is experienced for a SKU-pack within the Demand Group at the specified location. The sequence in which sources appear on the list reflects 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.

Figure 5–30 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 are given a warning message indicating that the warehouse will be removed from the Selected Secondary Sources list if 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 are given a warning message indicating that the warehouse will be removed from the Selected Destination Warehouses list if you choose to continue.

3. Click **Save**. A verification window prompts you to confirm your decision.
4. Click **OK**.

Note: The list of Selected Secondary Sources, visible in the screen at the time of clicking **Save**, replaces 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/Destinations.

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 sources from the Selected Secondary Sources list.
3. Click **Save**. A verification window prompts you to confirm your decision.
4. Click **OK**.

Note: Use the **Uncheck All** checkbox to clear all sources checked for deletion prior to clicking **Update List**.

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. Click **OK**.

Changing Secondary Source Priority

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.

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

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**. A verification window prompts you to confirm your decision.
4. Click **OK**.