

Oracle® Retail Advanced Inventory Planning

Data Management User Guide

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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.

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Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit

<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit

<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Related Documents

For more information, see the following documents in the Oracle Retail Advanced Inventory Planning Release 15.0.2 documentation set:

- *Oracle Retail Advanced Inventory Planning Data Management User Guide*
- *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 Order Management User Guide*
- *Oracle Retail Advanced Inventory Planning Release Notes*
- *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 15.0 documents are available on My Oracle Support:

- *Oracle Retail Advanced Inventory Planning Calculations for Store and Warehouse Replenishment Planning* (Doc ID 2075628.1)
- *Oracle Retail Advanced Inventory Planning Order Review and Approval* (Doc ID 2076972.1)
- *Oracle Retail Advanced Inventory Planning Supply Chain Creation 15.x* (Doc ID 2081101.1)

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, 15.0) or a later patch release (for example, 15.0.2). 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.

Improved Process for Oracle Retail Documentation Corrections

To more quickly address critical corrections to Oracle Retail documentation content, Oracle Retail documentation may be republished whenever a critical correction is needed. For critical corrections, the republication of an Oracle Retail document may at times not be attached to a numbered software release; instead, the Oracle Retail document will simply be replaced on the Oracle Technology Network Web site, or, in the case of Data Models, to the applicable My Oracle Support Documentation container where they reside.

This process will prevent delays in making critical corrections available to customers. For the customer, it means that before you begin installation, you must verify that you have the most recent version of the Oracle Retail documentation set. Oracle Retail documentation is available on the Oracle Technology Network at the following URL:

<http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html>

An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of a document with part number E123456-01.

If a more recent version of a document is available, that version supersedes all previous versions.

Oracle Retail Documentation on the Oracle Technology Network

Oracle Retail product documentation is available on the following web site:

<http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html>

(Data Model documents are not available through Oracle Technology Network. You can obtain them through My Oracle Support.)

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.
monospace	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.

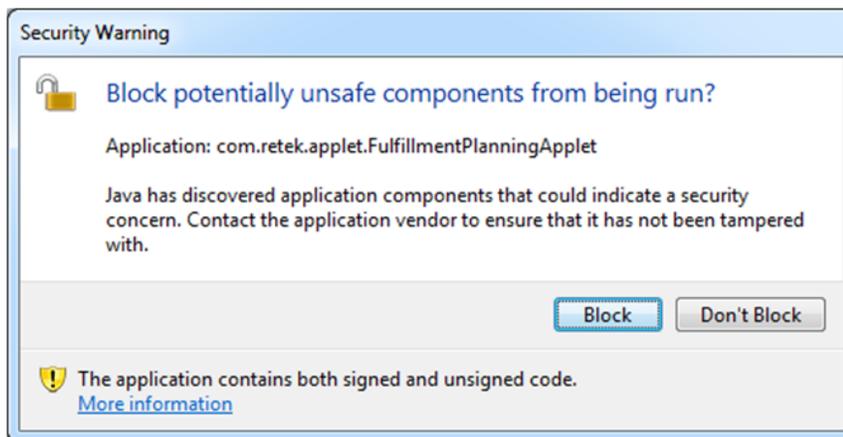
Note: If the User Console is visible when you log in, then proceed to Step 5.

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

Warning Message

When launching this application, you may see the Security Warning shown in [Figure 2-1](#). Click **Don't Block** to continue.

Figure 2-1 Security Warning



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 2-2](#) and are described in [Table 2-1](#).

Figure 2-2 AIP Workspace

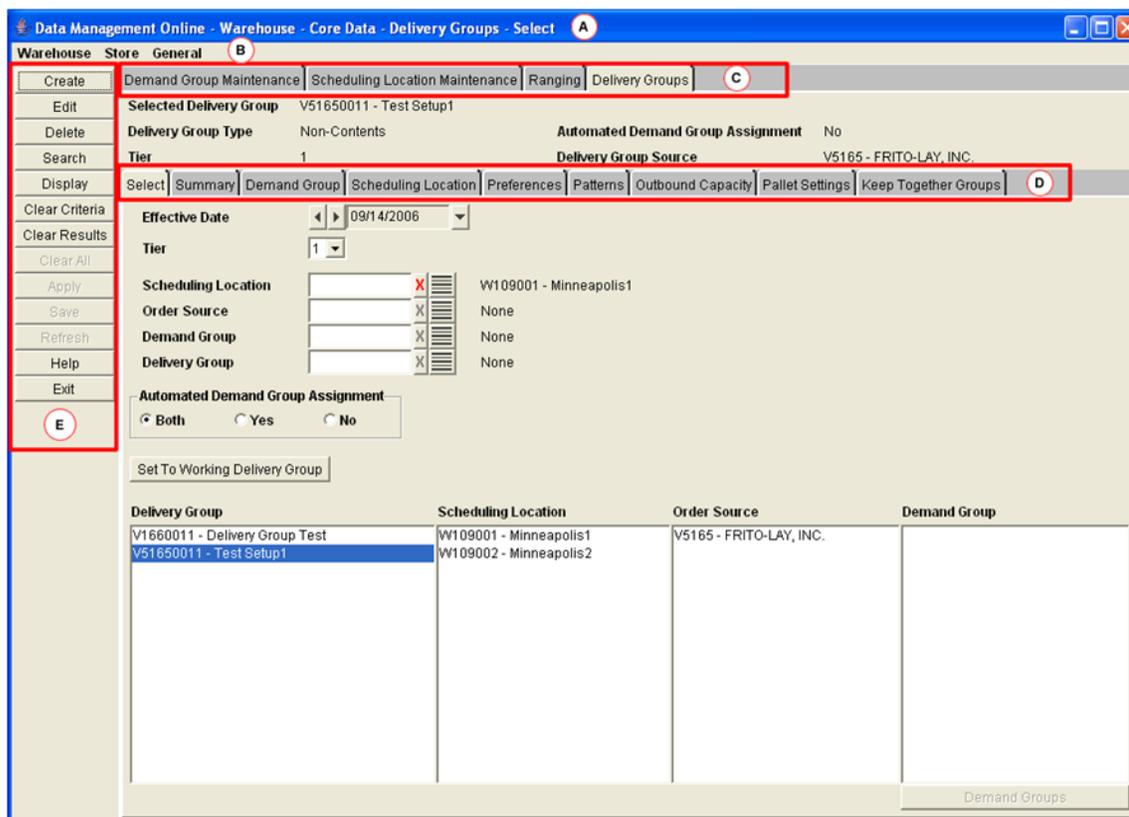


Table 2-1 AIP Workspace Elements

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 2–3 *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.

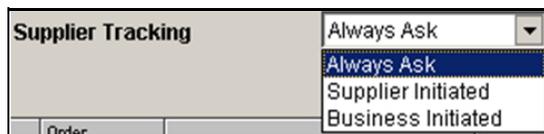
Move the Date

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 2-4 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 2-5 Example of Field-Level Filters

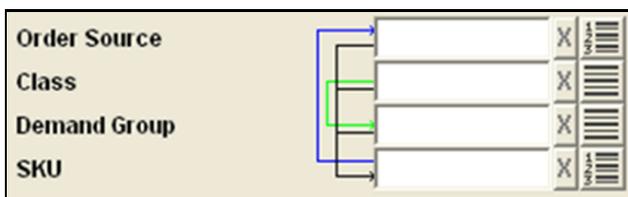


Table 2-2 Description of Field-Level Filters

Field Name	Results in Limits to:	Indicated by:
Order Source, Class, and SKU	Stock Keeping Unit (SKU)	Black arrow
Class	SKU	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 2–6 Clear LOV Button



To clear the field, click the clear LOV button.

Figure 2–7 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.

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:

- SKU - Filtered to only display SKUs 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:

- SKU - Filtered to only display SKUs 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:

- SKU - Filtered to only display SKUs 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	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: <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.

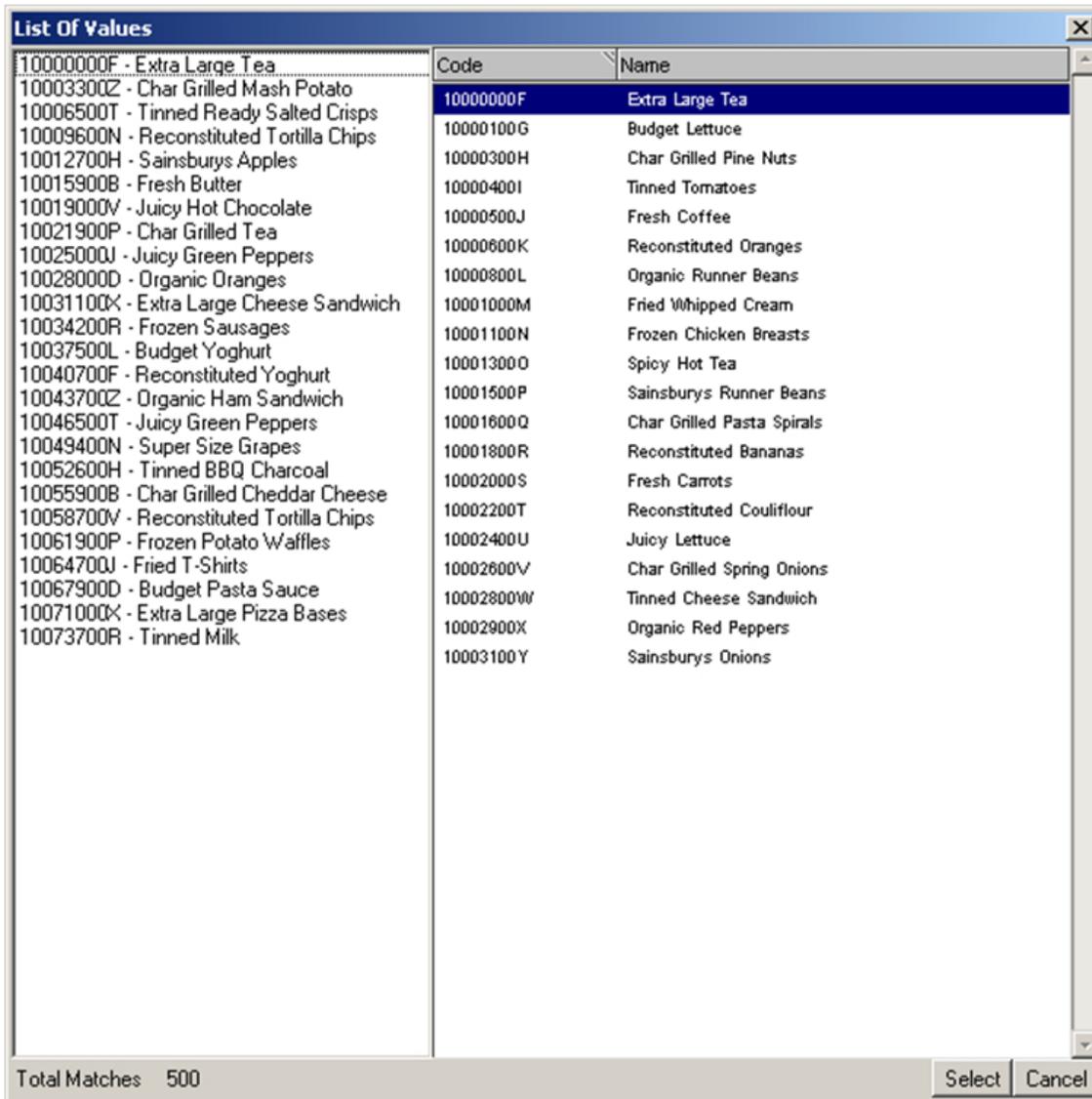
The list of values window displays the first set of 20 values and a paging mechanism. To view additional sets of information, select from the list on the left side.

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 2-8 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.

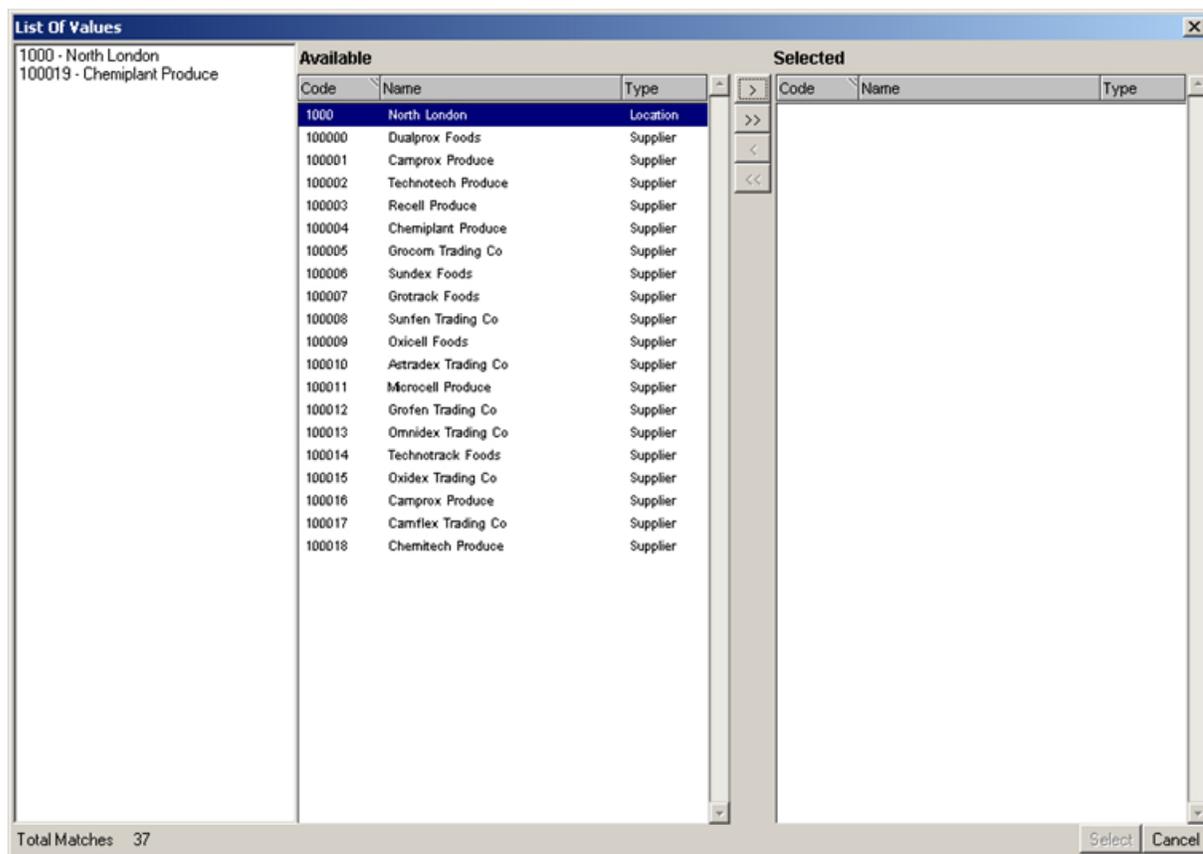
2. Select a value. Page as necessary to find your value.
3. Click **Select**. The field is automatically filled in with the selected value.

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 2–9 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 2-10 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-APR-06, Source 100139, Demand Group 100556 , 2		New Source Split	04/12/2006

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 2-11 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.

Table 2–5 (Cont.) Description of Paging Controls

Image	Button	Description
	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. Click the [Alerts Tab](#).

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. Click the [Alerts Tab](#).

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. Click the [Alerts Tab](#).

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. Click the [Alerts Tab](#).

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 Intra-day Batch Run Waves](#)
- [Maintain the Delivery-day Demand Percent](#)
- [Maintain Pre-allocation](#)
- [Maintain Cross-dock](#)

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. Click 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. Click 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. Click 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. Click the Planning Horizon Maintenance tab.

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

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

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

View a Store Ordering or Warehouse Ordering Schedule

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

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

View a Store Ordering Schedule

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

Figure 3-3 WH & Store Ordering Schedules - Store Tab

The screenshot shows the 'Data Management Online - General - Core Data - Pre-Allocation' window. The 'Store' tab is active, showing 'Warehouse from Source Schedule'. The 'Effective Date' is set to 10/6/2016. Below this, there are fields for Store, Class, and SKU, each with a dropdown menu and a 'None' option. The main part of the screen is a calendar grid for October 2016, with columns for days of the week (Thu 6 to Wed 19) and rows for various scheduling categories. The categories listed are: Default Store Order Cycle Lead Time, Profile Default Release Exception, SKU Exception, Store Profile Exception, SKU / Store Exception, Release Exception, Store Schedule, Corporate Non-Receipt Day, Corporate Non-Release Day, Corporate Non-Release Day Exception, and Resultant Schedule. Each cell in the grid contains a checkbox, indicating the status of the schedule for that day.

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. Click 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 SKU field, enter the SKU ID, or click the LOV button and select a SKU.
5. Click **Search**. Information pertaining to the selected warehouse, source, and SKU is displayed on the calendar.

Note: Warehouse schedules are only produced for a SKU 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

The screenshot shows the 'Receiving Calendar' interface in Data Management Online. The 'Store' tab is selected, and the 'Receiving Calendar' sub-tab is active. The 'Effective Date' is set to 4/18/2012. The 'Destination Type' is set to 'Store'. The 'SKU Type' is set to '0' and the 'Store Format' is set to 'All Formats'. A list of 'Available Destinations' is shown, including 'S0 - tst', 'S1 - ABILIO SOARES_SP', 'S10 - asdf', and several test stores. A 'Selected Destinations' area is empty. Below this, a 'Displayed Destination' is set to 'None'. The 'Receiving Calendar' section shows a calendar grid for April and May, with checkboxes for each day. The 'Effective Date' is 4/18/2012. There are three radio button options: 'New Default Pattern', 'New Exception Pattern', and 'Date Update', with 'Date Update' selected.

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**.

Maintain Intra-day Batch Run Waves

A Batch Run Wave is a time of day when a batch process is run to automatically release or replan orders, or both. All orders are released overnight except the products and locations that are assigned to be released later in the day. By spreading product/locations across batch run waves, you are able to drip-feed orders to the supplier or warehouse as they are required for processing.

Postponing release from overnight to within the day provides an opportunity for reacting to excessive sales, changing inventory positions (that is, returns, inventory adjustment), and delivery delays or shortages that can occur during the day. By taking advantage of this information and re-planning the orders AIP can provide a new order recommendation before the order is physically run or picked at the source.

Viewing Batch Run Waves

Navigate: Log into Data Management. From the General menu, select Core Data and then click the Intra-day Batch Run Wave tab.

Figure 3–5 Intra-day Batch Run Wave

Data Management Online - General - Core Data - Intra-day Release Wave

Warehouse Store General

Planning Horizon Maintenance Receiving Calendar WH & Store Ordering Schedules Intra-day Release Wave Delivery-day Demand Percent Pre-Allocation Cross-dock

Summary Assignments

Release Date: 10/6/2016

Location Type: All

Location: None

Department: None

Release Wave	Thursday 10/6/2016	Friday 10/7/2016	Saturday 10/8/2016	Sunday 10/9/2016	Monday 10/10/2016	Tuesday 10/11/2016	Wednesday 10/12/2016
00:00							
01:00							
02:00							
03:00							
04:00							
05:00							
06:00							
07:00							
08:00							
09:00							
10:00							
11:00							
12:00							
13:00							
14:00							
15:00							
16:00							
17:00							
18:00							
19:00							
20:00							
21:00							
22:00							

1. Display batch run waves by specifying the following criteria:

Field	Description
Release Date	Sets the date from which batch run waves are displayed.
Store LOV	Displays all stores in the system.
Department LOV	Displays all Departments in the system limited by your security privileges.

2. Click **Search** to populate the grid as shown in [Figure 3–6](#). From the grid, you can either [Manage Inventory Snapshot Times](#) or [View Batch Run Wave Assignments](#).

Manage Inventory Snapshot Times

From the populated grid in the Intra-day Batch Run Wave window, you can edit a manage Inventory Snapshot Times (Revise Sales Intra-day functionality must be enabled).

1. Select the Inventory Snapshot Time option
2. Double-click any populated cell in the grid.
DM opens the [Manage Inventory Snapshot Time Window](#).

Figure 3–6 Manage Inventory Snapshot Time Window

3. Manage the Inventory Snapshot Time by updating the following fields:

Field	Description
Day-of-Week	Set the days of the week to which the Inventory Snapshot Time will apply.
Inventory Snapshot Time	Select the appropriate from the respective dropdown lists.
Inventory Snapshot Delivery Demand Percent (DDP)	When the Inventory Snapshot DDP option is selected, enter a percentage representing the remaining demand that can be met by on-hand inventory at the point the snapshot is taken for the intra-day batch run.
Cancel	Click Cancel to clear all unsaved changes when confirmed on a secondary Confirm window.
Save	Save is available when one or more days of the week values are selected, time or DDP is selected. Click Save to commit changes to the database, close the Manage Inventory Snapshot Times Window, and refresh the results in the grid.

View Batch Run Wave Assignments

From the populated grid in the Intra-day Batch Run Wave window, you can edit a view assignments saved to a batch run wave.

1. Select the Assignment Summary option.
2. Double-click any populated cell in the grid.
DM opens the [Batch Run Wave Assignments Tab](#).

Maintain Batch Run Wave Assignments

The Batch Run Wave Assignments tab allows you to display the stores and departments assigned to a batch run wave as well as, add and/or edit the data. Functionality for this tab is described in [Table 3–1](#).

Navigate: From the Intra-day Batch Run Wave tab click the Assignments sub-tab.

Figure 3–7 Batch Run Wave Assignments Tab

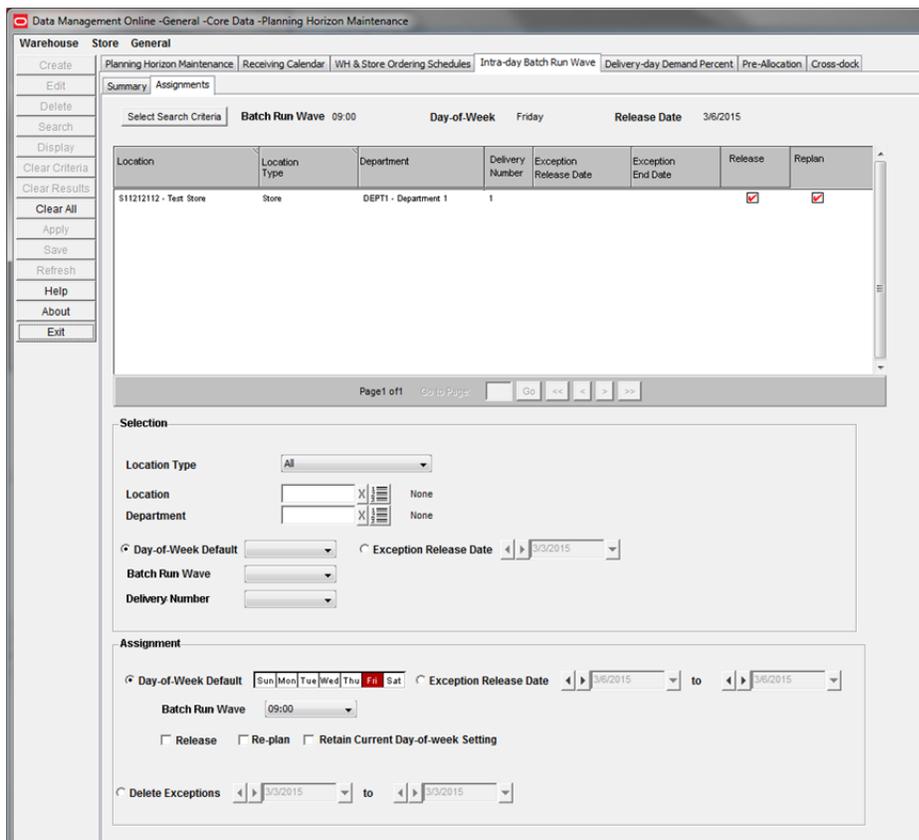


Table 3–1 Batch Run Wave Assignments Tab Functionality

Area	Field	Description
Top	Select Search Criteria Button	Opens the Select Search Criteria Window .
	Release check box	Selecting this check box allows you to edit the release indicator for a specific assignment.
	Replan check box	Selecting this check box allows you to edit the replan indicator for a specific assignment.
Selection	Selection pane	Used to specify criteria for selecting product/location combinations which will be included in the create/update save operation.
	Store LOV	Contains all stores in the system and allows you to select stores to be included in the save operation.
	Department LOV	Contains all departments in the system limited by your security privileges and allows you to select departments to be included in the save operation.
	Day-of-Week Default	Select which day of the week the update/create save operation should be limited to.
	Exception Release Date	Select the Exception release date that the save operation will be limited to.
	Batch Run Wave	Select which batch run wave the update/create save operation should be limited to.

Table 3–1 (Cont.) Batch Run Wave Assignments Tab Functionality

Area	Field	Description
Assignment	Assignment pane	Must be used in conjunction with the Selection pane. The Assignment selection is used to specify the new values for the create/update save operation.
	Day-of-Week Default	Creates a new default value.
	Exception Release Date	Creates a new dated exception.
	Batch Run Wave	Select the Batch Run Wave to be applied to the new Day-of-Week Default or Exception Release Date. Re-plan IndicatorSelect from the following options: <ul style="list-style-type: none"> ■ No Re-plan ■ Re-plan ■ Retain Current DOW Setting
	Delete Exception	Deletes an existing dated exception.

Search for Batch Run Wave Assignments

Navigate: From the [Batch Run Wave Assignments Tab](#), click **Select Search Criteria** to open the Select Search Criteria window. Functionality for this window is described in [Table 3–2](#).

Figure 3–8 Select Search Criteria Window
Table 3–2 Select Search Criteria Window Functionality

Field	Description
Release Date	The date for which any existing data will be displayed.
Batch Run Wave	The batch run wave of the existing data to be displayed for the selected date.
Location Type	This drop-down list allows you to select either All, All Warehouses, or All Stores.
Location	Contains all stores and warehouses in the system.
Department	Contains all departments in the system limited by your security privileges.
Search	Click Search to populate the main grid with search results.
Clear Criteria	Click Clear Criteria to reset all components to their default value.

Table 3–2 (Cont.) Select Search Criteria Window Functionality

Field	Description
Cancel	Click Cancel to clear all unsaved changes when confirmed on a secondary Confirm window

Maintain the Delivery-day Demand Percent

Delivery-day Demand Percent (DDP) at the store describes how much of a day's sales can be addressed by a shipment that arrives during that day. It allows AIP to mimic real world supply chain operations by planning for inventory arrival at any point in the day. This should result in more optimal inventory levels. The sales that can be addressed by a shipment depend on how soon the shelves are restocked after the shipment arrives. This must be accounted for in the value set by the Retailer. DDP can accommodate multiple deliveries per day to stores and can be set to a delivery-specific level.

DDP Scenarios:

- The retailer receives fresh baked goods every morning before the store opens. The baked goods are also stocked on the shelves before the store opens. All of the day's forecasted sales can be addressed by the shipment.
- The retailer's shipments typically arrives sometime between 11:00 AM and 1:00 PM. The restocking begins at 3:00 PM and takes multiple hours to complete the entire store. (Restocking is done methodically by area so it is easy to approximate when an area will be complete).
- The retailer's shipments arrives sometime during the working day but the re-stocking does not occur until overnight.

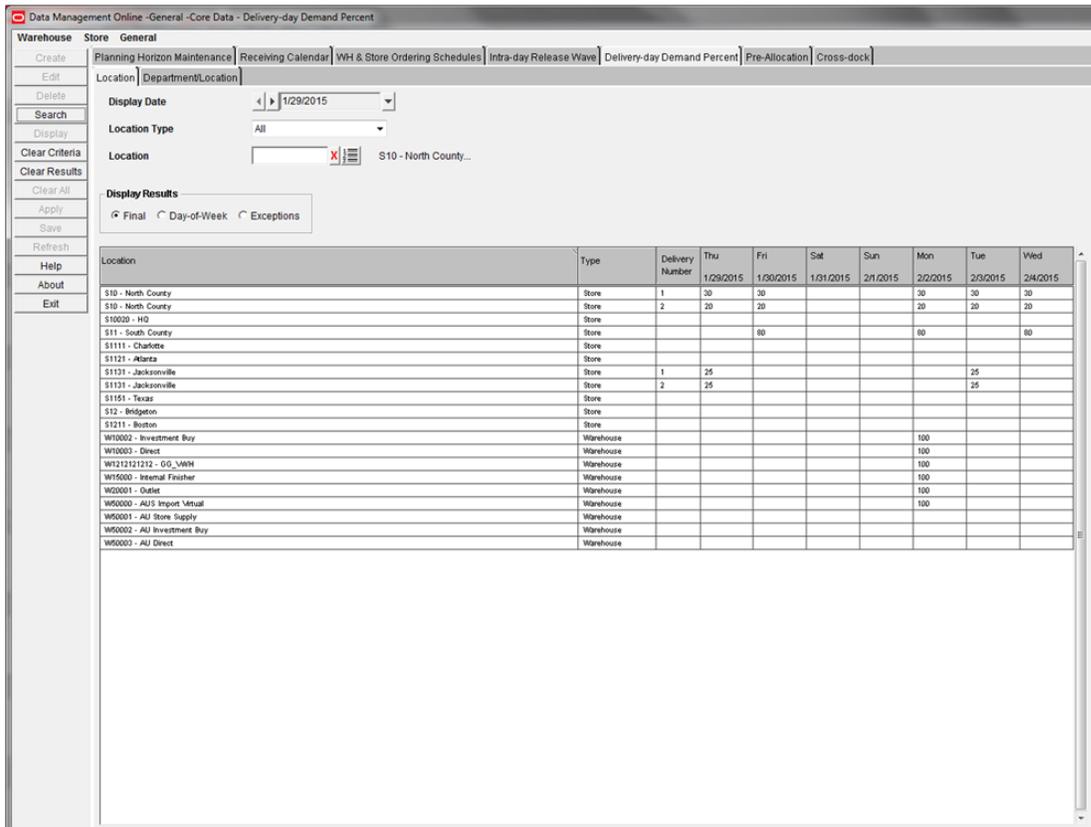
Specifying a DDP can address each scenario or a combination of scenarios. AIP will also offer Retailers the ability to derive the DDP from sales profiles instead of entering the store value. This allows Retailers with advanced sales capturing capabilities to leverage the sales information to get the most accurate percentage based on the expected on-shelf time.

Delivery-day Demand Percent at the warehouse represents a similar case however warehouses are not as space constrained as stores and as a result are less impacted by bringing in stock early to address shipments that may or may not go out before the warehouse receives its inbound shipments. Therefore the Delivery-day Demand Percent at the warehouse will be limited to all or nothing—100% or 0% respectively.

Searching for a Location's Current DDP

Navigate: Log into Data Management. From the General menu, select Core Data then Delivery-day Demand Percent.

Figure 3–9 Delivery-day Demand Percent



1. Click the Location tab.
2. Select from the following search criteria:

Field	Description
Display Date	Sets the date to that effective defaults and exceptions should be displayed.
Location Type	Set the location type or store format to search for locations. Note: Your system settings may limit the options available in this list.
Location	Displays all stores and warehouse limited by the Location Type selection.

3. Click **Search** to populate the grid.
4. From the Display Results area select which results you wish to work with.

Note: The Day-of-Week displays in the cells for dates where no exception exists. If an exception exists for a date it is displayed in the grid column and highlighted with a red background. An exception overrides all deliveries on a given day.

Set Location Default Pattern

Perform the following steps to establish the Delivery-day Demand Percent Default Pattern:

1. In the Display Results area select Day-of-Week.
2. In the results grid double click a location day of week to maintain.
3. Select Update Day of Week for each day to set or modify.
4. For each day of the week to set or modify double-click to enable the field and type the Delivery-day Demand Percentage.
5. Click **Save**. You are prompted to confirm your decision.

Set Location Exception

Perform the following steps to create or modify a Delivery-day Demand Percent exception:

1. In the Display Results area select Exception.
2. In the results grid double click the location date column.
3. Select the From Date.
4. Select the To Date
5. Select Create Exception.
6. Enter the Delivery-day Demand Percentage.
7. Click **Save**. You are prompted to confirm your decision.

Note: Any existing exception saved for the location between the From and To Dates is replaced with the exception created.

Delete Location Exception

Perform the following steps to delete a Delivery-day Demand Percent exception days:

1. In the Display Results area select Exception.
2. In the results grid double click the location date column.
3. Select the From Date to delete.
4. Select the To Date to delete
5. Select Delete Exception.
6. Click **Save**. You are prompted to confirm your decision.

Mass Change Location Defaults

Perform the following steps to mass create or modify a Delivery-day Demand Percent Day of Week Pattern:

1. In the Display Results area select Day-of-week.
2. In the results grid select one or more locations.
3. Click **Mass Change**.
4. Follow the steps in Set Location Default Pattern.

Mass Change Location Exception

Perform the following steps to mass create or modify a Delivery-day Demand Percent Exception:

1. In the Display Results area select Exception.
2. In the results grid select one or more locations to maintain.
3. Click **Mass Change**.
4. Follow the steps in Set Location Exception.

Mass Delete Location Exception

Perform the following steps to mass delete a Delivery-day Demand Percent Exception:

1. In the Display Results area select Exception.
2. In the results grid select one or more locations to maintain.
3. Click **Mass Change**.
4. Follow the steps in Delete Location Exception.

Search for Department/Location's Current DDP

Navigate: Log into Data Management. From the General menu, select Core Data then Delivery-day Demand Percent.

Figure 3–10 Delivery-day Demand Percent by Department/Location

The screenshot shows the 'Data Management Online - General - Core Data - Delivery-day Demand Percent - Department/Location' window. The 'Location' tab is selected, and the 'Display Date' is set to 9/24/2013. The search criteria are set to 'View Delivery day Demand Percent By' with 'Department' selected. The 'Location Type' is set to 'All'. The search results are displayed in a table with columns for Department, Tue (9/24/2013), Wed (9/25/2013), Thu (9/26/2013), Fri (9/28/2013), Sat (9/29/2013), Sun (9/30/2013), and Mon (10/01/2013). The table lists various departments such as '1100 - Delis/grocery', '1109 - Yogurt', '1115 - Health/Beauty Care', '1117 - Lighting', '2101 - Men's Casual', '2102 - Men's Footwear', '3001 - Home Textiles', '3004 - Appliances', '3011 - Office Furniture', '3026 - Home Decor', '3041 - Pet', '3001 - Books/Paperback', and '3110 - Personal Care'. The '3001 - Home Textiles' row is highlighted in blue. A 'Mass Change' button is visible at the bottom right of the table.

Department	Tue 9/24/2013	Wed 9/25/2013	Thu 9/26/2013	Fri 9/28/2013	Sat 9/29/2013	Sun 9/30/2013	Mon 10/01/2013
1100 - Delis/grocery							
1109 - Yogurt							
1115 - Health/Beauty Care							
1117 - Lighting							
2101 - Men's Casual							
2102 - Men's Footwear							
3001 - Home Textiles							
3004 - Appliances							
3011 - Office Furniture							
3026 - Home Decor							
3041 - Pet							
3001 - Books/Paperback							
3110 - Personal Care							

1. Click the Department/Location tab.
2. Select from the following search criteria.

Field	Description
Display Date	Sets the date to that effective defaults and exceptions should be displayed.
View By	Select Department to view DDP for 1 department across multiple locations. Select Location to view DDP for 1 location across multiple departments.
Location Type	Set the location type or store format to search for locations. Note: Your system settings may limit the options available in this list.
Location	Displays all stores and warehouse limited by the Location Type selection. When View By is Location this field is required.
Department	Displays the departments that contain at least one class assigned to the user. When View By is department this field is required.

3. Click **Search** to populate the grid.
4. From the Display Results area select which results you wish to work with.

Set Department/Location Default Pattern

Perform the following steps to establish the Delivery-day Demand Percent Default Pattern:

1. In the Display Results area select Day-of-Week.
2. In the results grid double click a department or location day of week to maintain.
3. Select Update Day of Week for each day to set or modify.
4. For each day of the week to set or modify double-click to enable the field and type the Delivery-day Demand Percentage.
5. Click **Save**. You are prompted to confirm your decision.

Set Department/Location Exception

Perform the following steps to create or modify a Delivery-day Demand Percent exception:

1. In the Display Results area select Exception.
2. In the results grid double click the department or location date column.
3. Select the From Date.
4. Select the To Date.
5. Select Create Exception.
6. Enter the Delivery-day Demand Percentage.
7. Click **Save**. You are prompted to confirm your decision.

Note: Any existing exception saved for the department/location between the From and To Dates is replaced with the exception created.

Delete Department/Location Exception

Perform the following steps to delete a Delivery-day Demand Percent exception days:

1. In the Display Results area select Exception.
2. In the results grid double click the department or location date column.
3. Select the From Date to delete.
4. Select the To Date to delete.
5. Select Delete Exception.
6. Click **Save**. You are prompted to confirm your decision.

Mass Change Department/Location Defaults

Perform the following steps to mass create or modify a Delivery-day Demand Percent Day of Week Pattern:

1. In the Display Results area select Day-of-week.
2. In the results grid select one or more department or locations.
3. Click **Mass Change**.
4. Follow the steps in Set Department/Location Default Pattern.

Mass Change Department/Location Exception

Perform the following steps to mass create or modify a Delivery-day Demand Percent Exception:

1. In the Display Results area select Exception.
2. In the results grid select one or more departments or locations.
3. Click **Mass Change**.
4. Follow the steps in [Set Department/Location Exception](#).

Mass Delete Department/Location Exception

Perform the following steps to mass delete a Delivery-day Demand Percent Exception:

1. In the Display Results area select Exception.
2. In the results grid select one or more departments or locations.
3. Click **Mass Change**.
4. Follow the steps in [Delete Department/Location Exception](#).

Maintain Pre-allocation

Pre-allocation allows you to define the supply chain for planning pre-allocation scenarios.

Key Characteristics of Pre-allocation

The key characteristics of a Multi-level Distribution (MLD) pre-allocation scenario includes:

- An inventory movement (purchase order or transfer) that drives inventory into a warehouse is released to the execution systems on its normal lead-time.

The inventory movement can be:

- A transfer or a purchase order.

- For all or a subset of the products available from the originating source (vendor or warehouse). Users need to directly control the extent of the subset of products to which the scenario applies.
- At a pre-determined point prior to inventory arrival at the warehouse, a collection of inventory movements (allocations) is released to the warehouse.
 - These allocations consume the arriving inventory and are linked to the inbound transaction so that the warehouse knows not to unnecessarily put away any arriving inventory.
 - Any arriving inventory which is not consumed by outbound movements is assumed to be put away.
- The pre-determined point at which the allocation is released is configurable as a period of time ahead of the inventory arrival point.
 - A period of zero time indicates that the allocation should be released at the last possible time prior to inventory arrival.
 - The maximum period of time is always capped during the allocation process because the allocation cannot be released before the originating inbound inventory movement is released.
- Users are able to specify when it is important that all inventory due into the warehouse needs to be allocated - regardless of need.

In these situations, all inbound inventory must be allocated – regardless of exceeding the need from downstream destinations.

If *unspoken for* inventory suddenly appears prior:

- To the point an additional allocation must be produced which consumes it.
- In Current Inventory, transfers must be produced that consume it.
- In situations where all of the inbound inventory need not be allocated, an allocation staging window is required to determine how many days shipments out of the warehouse can be considered when allocating the inventory before it is deemed to be put away – at which point subsequent outbound movements can be assumed to be satisfied from inventory.
- Regardless of the allocation staging window, which downstream destinations are considered for the allocation or the need to ensure that all inbound inventory is pre-allocated, the day on day and over time reconciliation methods remain as the key drivers to distributing inventory in shortage and surplus situations.

The pre-allocation simply determines which outbound allocations are linked to the inbound inventory movement – not what quantities each downstream destination will receive.

Setting Pre-allocation

Navigate: Log into Data Management. From the General menu, select Core Data and then click the Pre-Allocation tab.

Figure 3–11 Pre-Allocation Window

The screenshot shows the 'Pre-Allocation' window in Data Management Online. The search criteria are as follows:

- Effective Date: 11/30/2016
- Warehouse: W1000 - N American Import WH
- Product Level: All, Class, SKU
- Class: None
- SKU: None

The search results table is as follows:

Class	SKU	Warehouse	Pre-allocate	Must Consume	Staging Window	Pre-release Window
		W1000 - N American Import WH		<input checked="" type="checkbox"/>		

1. Search for possible pre-allocation scenarios by specifying the following search criteria:

Field	Description
Effective Date	Sets the date for the search functionality.
Warehouse LOV	Displays all warehouses in the system.
Product Level	Displays the product level of the options: <ul style="list-style-type: none"> ■ All Shows all selected warehouse destinations. In the grid, the Class and SKU columns are empty for these rows. ■ Class Shows all destination/class combinations that match the search criteria. If no Class is selected then all classes that contain at least one SKU-pack that is profile-ranged, exception ranged, or pending de-ranged at the warehouses will be returned. ■ SKU Shows all destination/SKU combinations that match the search criteria. You are required to select classes to limit the search. If no SKU is selected then all SKUs that contain at least one pack-size that is profile-ranged, exception ranged, or pending de-ranged at the warehouses will be returned.
Class LOV	Displays all Classes in the system limited by your class-level security privileges.
SKU LOV	Displays all SKUs in the system limited by your class-level security privileges. It is filtered by the Class selection
Product Level	Select at least one option: <ul style="list-style-type: none"> ■ All—returns all possible combinations of source/destination limited only by other search criteria. ■ Class—returns all source/destination/class combinations that match other search criteria and where at least one SKU-pack in the class can be supplied by the source and received by the destination. ■ SKU—returns all source/destination/SKU combinations that match other search criteria and where at least one pack-size of the SKU can be supplied by the source and received by the destination.
Class LOV	Displays all classes in the system limited by your security privileges. When the SKU check box is selected, then you must select at least one Class.

Field	Description
SKU LOV	Displays all classes in the system limited by your security privileges. It is also limited by selections in the Class LOV.

- Click **Search** to populate the grid as shown in [Figure 3–11, "Pre-Allocation Window"](#). From the grid, you can either [Edit a Pre-allocation Scenario](#) or [Set Mass Change](#).

Edit a Pre-allocation Scenario

From the populated grid in the [Pre-Allocation Window](#), you can edit a pre-allocation scenario.

- To edit a pre-allocation scenario, either:
 - Select a row in the grid and click **Edit**.
 - Double-click any row in the grid.
 DM opens the [Edit Pre-allocation Window](#).

Figure 3–12 Edit Pre-allocation Window

- Edit the pre-allocation scenarios by updating the following fields:

Field	Description
Class	Pre-populated and reflects the Class from the selected row in the grid.
SKU	Pre-populated and reflects the SKU from the selected row in the grid.
Warehouse	Pre-populated and reflects the Warehouse from the selected row in the grid.
Use Current Effective Date	Option button is selected by default when the current effective date is after today.
Create New Effective Date	Option button is available when the current effective date is blank (from an unsaved row), or has an effective date that is less than or equal to today.

Field	Description
Pre-allocate	Drop-down options of: <ul style="list-style-type: none"> ▪ <i>Blank</i> Displays for undefined rows. You cannot change a saved row back to blank. ▪ Pre-allocated If selected, then the Must Consume and Pre-release Window fields are enabled and editable. ▪ Not Pre-allocated If selected, then all other fields are cleared and unavailable.
Must Consume	If selected, the Staging Window field is enabled and editable.
Staging Window	Can be set to a 3-digit integer from 0 to 999 that represents the number of days the inbound inventory can sit in a staging area before it is put away to stock.
Pre-release Window	Can be set to an integer number of days or set to indicate the allocation is released with the inbound PO or transfer (Release With Inbound). Valid pre-release days are from 0 to 999. Note: Allocation can never be released before the PO/transfer. Therefore an excessively large number of days will have the same affect.
Cancel	Click Cancel to clear all unsaved changes when confirmed on a secondary Confirm window.
Reset	Click Reset to clear all unsaved changes when confirmed on a secondary Confirm window.
Save	Click Save to commit changes to the database, close the Edit Pre-allocation Window , and refresh the results in the grid.

Set Mass Change

From the populated grid in the [Pre-Allocation Window](#), you can set mass change.

Maintain Cross-dock

Cross-dock allows you to is to define the supply chain for planning cross-docked routes. At the cross-docking point the goods are handled and there is no long-term storage, they are typically sent to the next destination within a day from when they arrive at the cross-docking point.

Cross-docking in planning is summarized as follows:

- The inbound quantity must match the outbound quantity at all cross-docking points (this is due to no storage occurring at any point).
- The quantity distributed to all cross-docking points must be fixed when the initial cross-dock transaction is released. Furthermore the transactions must be linked to ensure the outbound distribution occurs once the inbound receipt begins (and not before).

Supply Chain Process with Cross-docking

For planning, the supply chain is represented as a single movement between the originating source and final destination for cross-docked routes. In the resulting receipt plan the first source of a cross-dock appears as the source of the final cross-dock receiving destination.

The warehouses that the cross-dock flows through is hidden from planning to ensure that inbound and outbound quantities are completely aligned and there is no ability to

reconcile the quantities. Additionally, it aids a replenishment user who conceptualizes a cross-docked plan in terms of ultimate source and receiving destination, not individual transfer legs.

Figure 3–13 *Physical Supply Chain Cross-docked from Supplier to Store*

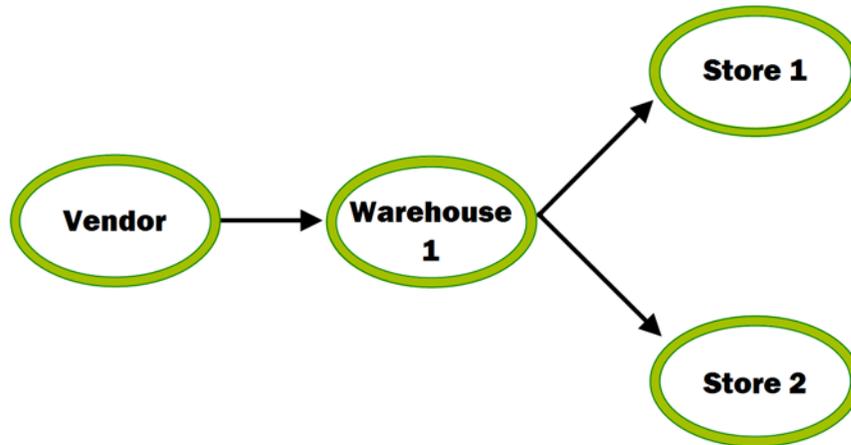
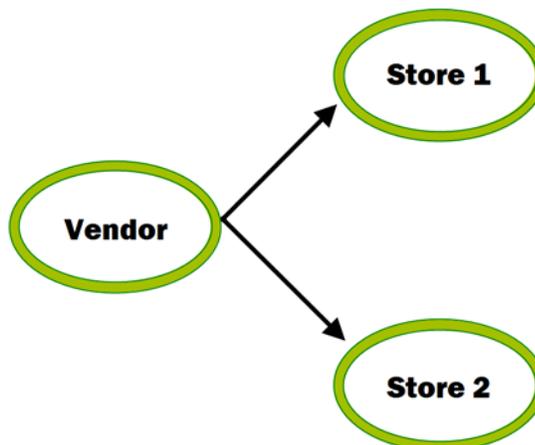


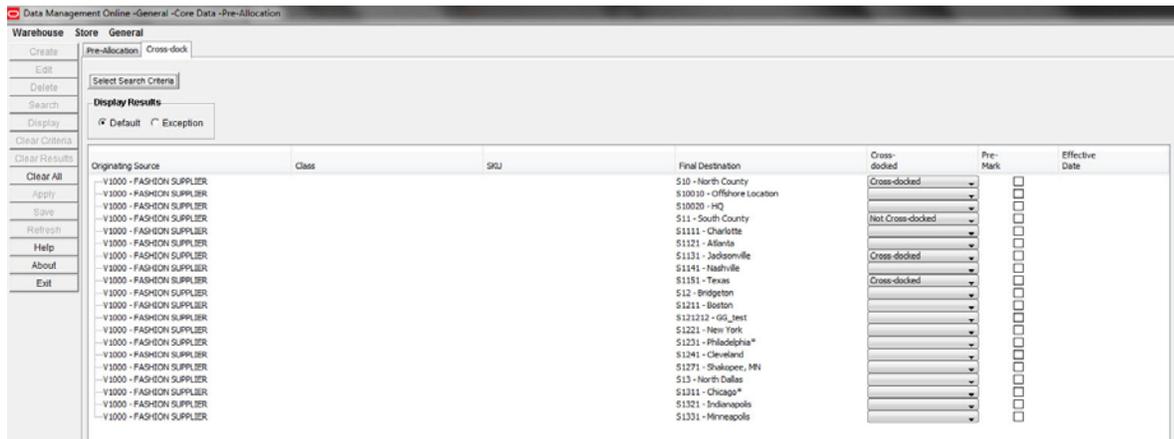
Figure 3–14 *User Setup Supply Chain*



Setting Cross-dock Routes

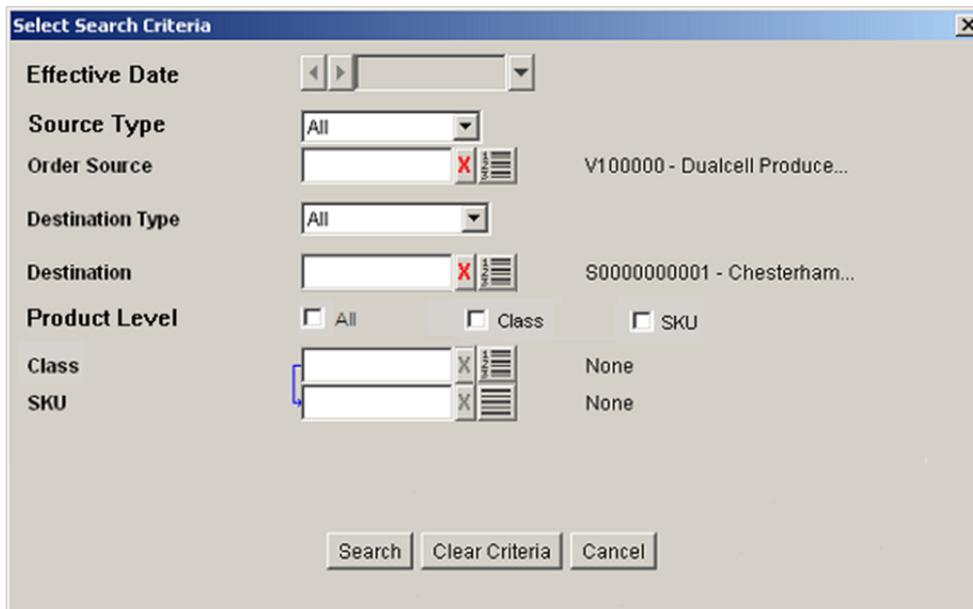
Navigate: Log into Data Management. From the General menu, select Core Data and then click the Cross-dock tab.

Figure 3–15 Cross-dock Route Tab



1. Click **Select Search Criteria** to open the [Select Search Criteria Window](#).

Figure 3–16 Select Search Criteria Window



2. Update the fields in the [Select Search Criteria Window](#).

Field	Description
Effective Date	Sets the date for the search functionality.
Source Type	Depending on your system configuration, this drop-down list provides the options of: <ul style="list-style-type: none"> ■ ALL (for suppliers and warehouses) ■ Suppliers Only (for suppliers only) Note: If your system configuration is supplier only, this drop-down list displays Supplier Only and any other selection is unavailable. Note: Selecting a Source Type limits the contents of the Order Source LOV

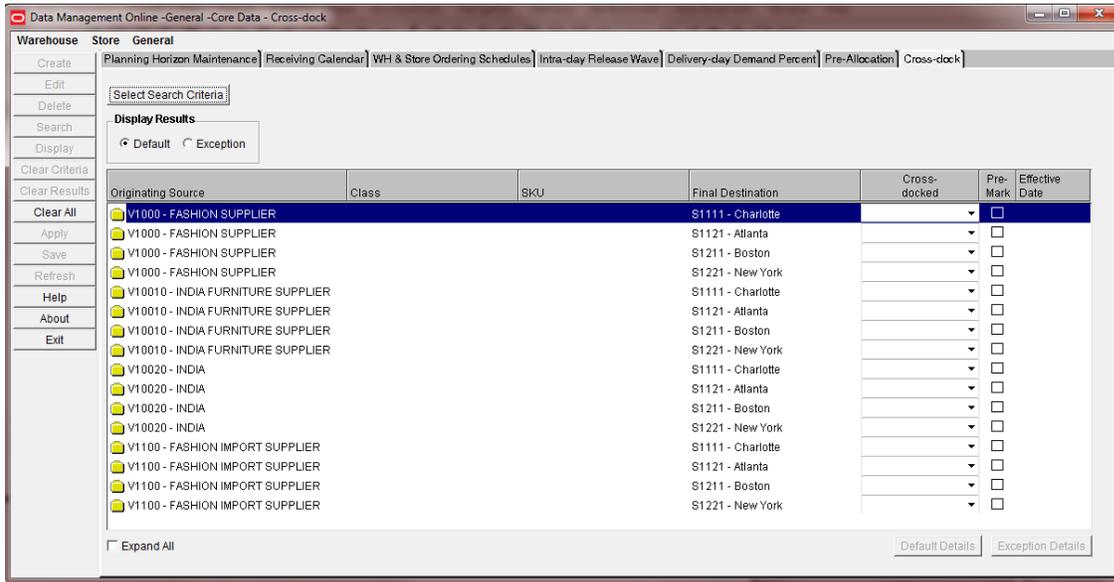
Field	Description
Order Source LOV	Displays valid sources of suppliers or warehouses.
Destination Type	This drop-down list provides the options of either: <ul style="list-style-type: none"> ▪ Stockholding stores ▪ Stockholding warehouses Note: Selecting a Destination Type limits the contents of the Destination LOV
Destination LOV	Displays valid sources of destinations.
Product Level	Select at least one option: <ul style="list-style-type: none"> ▪ All—returns all possible combinations of source/destination limited only by other search criteria. ▪ Class—returns all source/destination/class combinations that match other search criteria and where at least one SKU-pack in the class can be supplied by the source and received by the destination. ▪ SKU—returns all source/destination/SKU combinations that match other search criteria and where at least one pack-size of the SKU can be supplied by the source and received by the destination.
Class LOV	Displays all classes in the system limited by your security privileges. When the SKU check box is selected, then you must select at least one Class.
SKU LOV	Displays all classes in the system limited by your security privileges. It is also limited by selections in the Class LOV.

3. Proceed by selecting one of these buttons from the [Select Search Criteria Window](#):

Button	Description
Search	The Search button is available when: <ul style="list-style-type: none"> ▪ At least one Source and Destination is selected ▪ At least one Product Level is selected ▪ If the SKU check box is selected, then at least one Class must be selected Clicking Search returns all combinations of Source/Product Level/Destination whether they are cross-docked or not
Clear Criteria	The Clear Criteria button is available when any search criteria is entered. Clicking Clear Criteria resets the Select Search Criteria Window to its original state.
Cancel	Clicking Cancel opens a cancel confirmation message and if accepted, then returns you to the Cross-dock Route Tab .

4. Clicking **Search** opens the [Cross-dock Route Details Window](#).

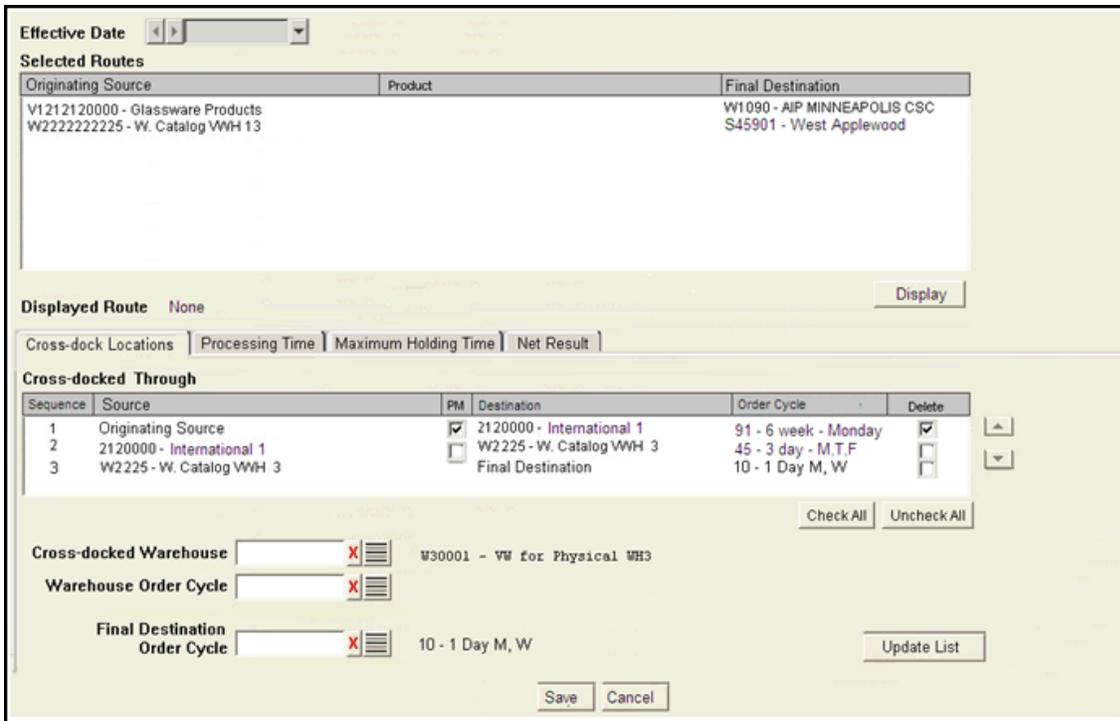
Figure 3-17 Cross-dock Route Details Window



- To edit or view the cross-dock route details, click **Default Details**.

DM opens the [Cross-dock Default Details Window](#) from the Cross-dock Locations tab.

Figure 3-18 Cross-dock Default Details Window



- View or update the window details in the [Cross-dock Default Details Window](#).

Window Details	Description
Effective Date	Displays the previously set Effective Date. Use the drop-down functionality to change.
Selected Routes	Displays the selected routes from the Cross-dock Route Details Window .
Display Button	This button is unavailable until a route is selected in the grid. Clicking Display shows the saved cross-docked locations and order cycles in the Cross-dock Locations tab. It also populates the Processing Time, Maximum Holding Time, and Net Result tabs.
Save Button	Clicking Save updates any changes and returns you to Cross-dock Route Tab .
Cancel Button	Clicking Cancel clears any changes and returns you to Cross-dock Route Tab .

7. The [Cross-dock Default Details Window](#) includes these tabs:
 - [Cross-dock Locations Tab](#)
 - [Processing Time Tab](#)
 - [Maximum Holding Time Tab](#)
 - [Net Result Tab](#)

Deleting Cross-dock Routes

Navigate: Log into Data Management. From the General menu, select Core Data and then click the Cross-dock tab. Continue to the [Cross-dock Default Details Window](#) as described in "[Setting Cross-dock Routes](#)".

1. From the [Cross-dock Default Details Window](#) from the Cross-dock Locations tab, delete the desired Source by selecting its **Delete** check box and then clicking **Update List**.
2. Data Management removes the row from the grid.
 - To update any changes, click **Save** and return to the [Cross-dock Route Tab](#).
 - To clear any changes, click **Cancel** and return to the [Cross-dock Route Tab](#).

Cross-dock Locations Tab

The Cross-dock Locations tab is shown in [Figure 3–18](#), "[Cross-dock Default Details Window](#)".

This tab allows you to display default details of the cross-dock route as well as, add and/or edit the data.

[Table 3–1](#) describes the functionality of the Cross-dock Locations tab.

Note: If a cross-dock warehouse is the same as any of the selected route sources or destinations, you will be unable to **Save** the route.

Table 3–3 Cross-dock Locations Tab Description

Tab Details	Description
Cross-docked Through	Lists the default details of the cross-dock route including sequence, source, destination and order cycle.
Cross-docked Warehouse LOV	Contains all warehouses in the system and allows you to add additional warehouses to the cross-dock route.
Warehouse Order Cycle LOV	Contains all warehouse order cycles in the system and allows you to add additional warehouse order cycles to the cross-dock route.
Final Destination Order Cycle LOV	Shows both warehouse order cycles and store order cycles. The type (Store or Warehouse) will be shown in the LOV next to the cycle code and name.
Update List button	<p>This button is available after all three LOVs have been populated. Click Update List to add the selected warehouse and order cycles to the Cross-docked Through grid.</p> <p>Once you have added warehouse and order cycles the first row has a Source of <i>Originating Source</i> with a destination of the Cross-docked Warehouse selection and an order cycle equal to the Warehouse Order Cycle selection. The second row has a Source of the Cross-docked Warehouse selection and a destination of <i>Final Destination</i>. The Final Destination Order Cycle selection will be used to populate the order cycle between the last cross-dock warehouse and the final destination.</p>
Save Button	<p>Clicking Save saves any undefined routes in cross-docked status including the parent route and any cross-docked through locations/date/cycle.</p> <p>If the Selected Routes grid contains:</p> <ul style="list-style-type: none"> ■ Both store and warehouse destinations, then you will receive a message indicating that only the routes matching the final destination order cycle type will be saved. For example, if you selected a store order cycle for the final destination order cycle and there are both store and warehouse destinations then you will receive a message indicating that only into-store routes will be saved. ■ Either all store destinations or all warehouse destinations and your final destination order cycle does not match the destination type, then you will receive a message that no changes can be saved because of an invalid final destination order cycle selection.
Cancel Button	Clicking Cancel clears any changes prior to Save .

Processing Time Tab

Figure 3–19 shows the Processing Time tab.

The Processing Time tab allows you to edit and enter a processing time. Processing time is a number of days from receipt until the shipment can be sent outbound. This is a single digit integer value between 0 and 9.

This tab is empty until a route is displayed or cross-dock warehouses are added in the Cross-dock Locations tab. The Processing Time tab only displays the intermediate Cross-dock through warehouses.

Figure 3–19 Processing Time Tab

Table 3–2 describes the functionality of the Processing Time tab.

Table 3–4 Processing Time Tab Description

Tab Details	Description
Day of the Week Cells	Double-click within a day of the week cell (S,M,T,W,T,F, S) to edit or enter a processing time.
Set all to field	To set all cells to a single value, enter the value in the Set all to field and then click Update List .
Update List	Available when a valid value is entered in the Set all to field.
Save Button	Save is available when any required valid values exist for all cells. Save saves any processing time updates for the cross-docked route.
Cancel Button	Clicking Cancel clears any changes prior to Save .

Maximum Holding Time Tab

Figure 3–20 shows the Maximum Holding Time tab.

The Maximum Holding Time tab allows you to edit and enter a processing time. Maximum Holding time is a number of days from after the processing time ends that the shipment is available to ship. This is a single digit integer value between 0 and 9.

This tab is empty until a route is displayed or cross-dock warehouses are added in the Cross-dock Locations tab. The Maximum Holding Time tab only displays the intermediate Cross-dock through warehouses.

Figure 3–20 Maximum Holding Time Tab

Table 3–5 describes the functionality of the Maximum Holding Time tab.

Table 3–5 Maximum Holding Time Tab Description

Tab Details	Description
Day of the Week Cells	Double-click within a day of the week cell (S,M,T,W,T,F, S) to edit or enter a processing time.
Set all to field	To set all cells to a single value, enter the value in the Set all to field and then click Update List .
Update List	Available when a valid value is entered in the Set all to field.
Save Button	Save is available when any required valid values exist for all cells. Save saves any processing time updates for the cross-docked route.
Cancel Button	Clicking Cancel clears any changes prior to Save .

Net Result Tab

Figure 3–21 shows the Net Result tab.

The Net Result tab shows the total lead time for a particular day.

This tab only uses the data entered in the details popup and not incorporate additional factors to the schedule such as receiving calendars and the like. Node-to-node schedules are the Warehouse Order Cycles set in the [Cross-dock Locations Tab](#).

Figure 3–21 Net Result Tab

Effective Date

Selected Routes

Originating Source	Product	Final Destination
V1212120000 - Glassware Products		W1090 - AIP MINNEAPOLIS CSC
W2222222225 - W. Catalog WHH 13		S45901 - West Applewood

Displayed Route

Maximum Holding Time

Warehouse	S	M	T	W	T	F	S
2120000 - International 1							
W2225 - W. Catalog WHH 3							

Set all to Days

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.

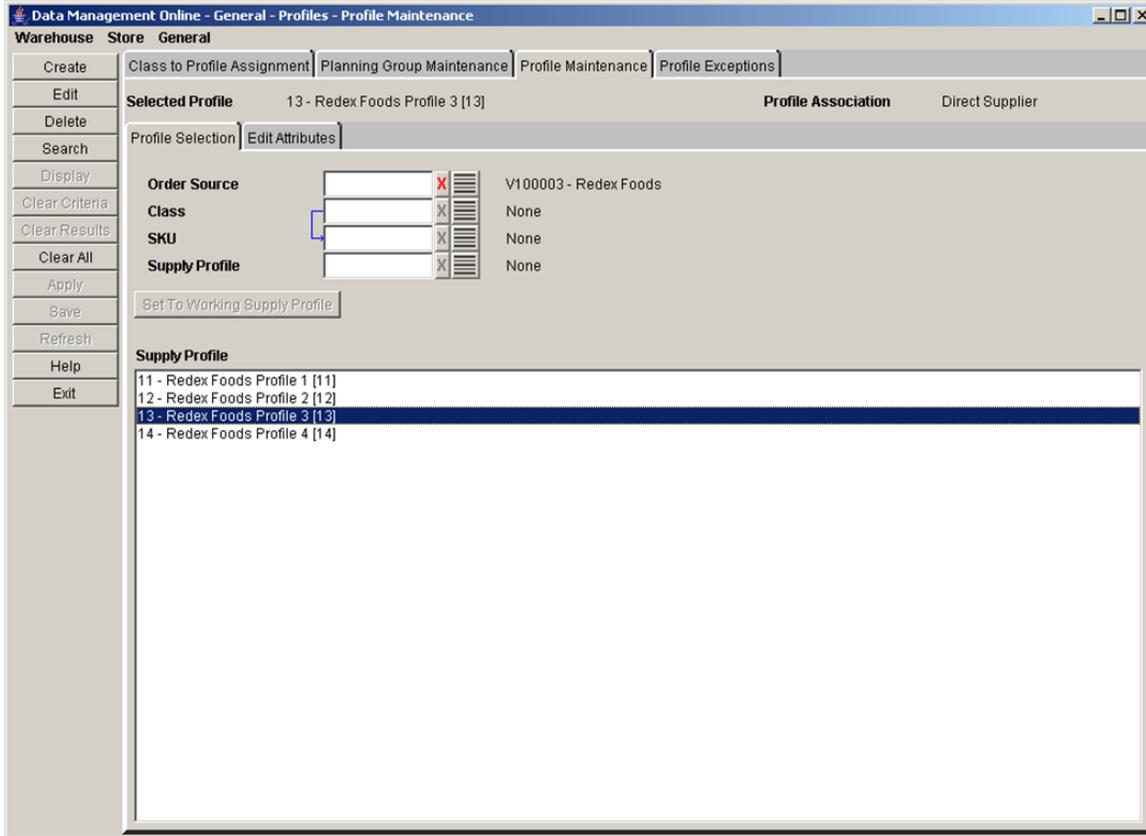
You can assign SKUs to both warehouse and supplier profiles. A SKU may exist in multiple supplier profiles, but only in one warehouse profile on a particular date.

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. From the Profile Maintenance primary tab, click the Profile Selection secondary tab.

Figure 3–22 Profile Selection Tab



1. Click Create. The [Create Supply Profile Window](#) opens.

Figure 3–23 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. Click 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. From the Profile Maintenance primary tab, click the Profile Selection secondary tab.

1. Set a profile as the working profile.
2. Click **Edit**. The [Edit Supply Profile Window](#) opens.

Figure 3–24 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. From the Profile Maintenance primary tab, click the Profile Selection secondary tab.

Figure 3–25 Profile Selection Tab

The screenshot shows the 'Profile Maintenance' window in 'Data Management Online'. The 'Profile Selection' tab is active, displaying the 'Selected Profile' as '13 - Redex Foods Profile 3 [13]' and the 'Profile Association' as 'Direct Supplier'. Below this, there are four input fields: 'Order Source' (with value 'V100003 - Redex Foods'), 'Class' (with value 'None'), 'SKU' (with value 'None'), and 'Supply Profile' (with value 'None'). A 'Set To Working Supply Profile' button is located below these fields. At the bottom, a 'Supply Profile' list is shown with four entries: '11 - Redex Foods Profile 1 [11]', '12 - Redex Foods Profile 2 [12]', '13 - Redex Foods Profile 3 [13]' (highlighted), and '14 - Redex Foods Profile 4 [14]'. A left-hand menu contains various actions like Create, Edit, Delete, Search, etc.

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. From the Profile Maintenance primary tab, click the Profile Selection secondary tab.

1. Set a profile as the working profile.
2. Click **Edit**. The [Edit Supply Profile Window](#) opens.

Figure 3–26 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. From the Profile Maintenance primary tab, click 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. From the Profile Maintenance primary tab, click the Profile Selection secondary tab.

1. Set a profile as a working profile.
2. Click the Edit Attributes tab.
3. Click 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 3–27 Store Order Cycle Tab

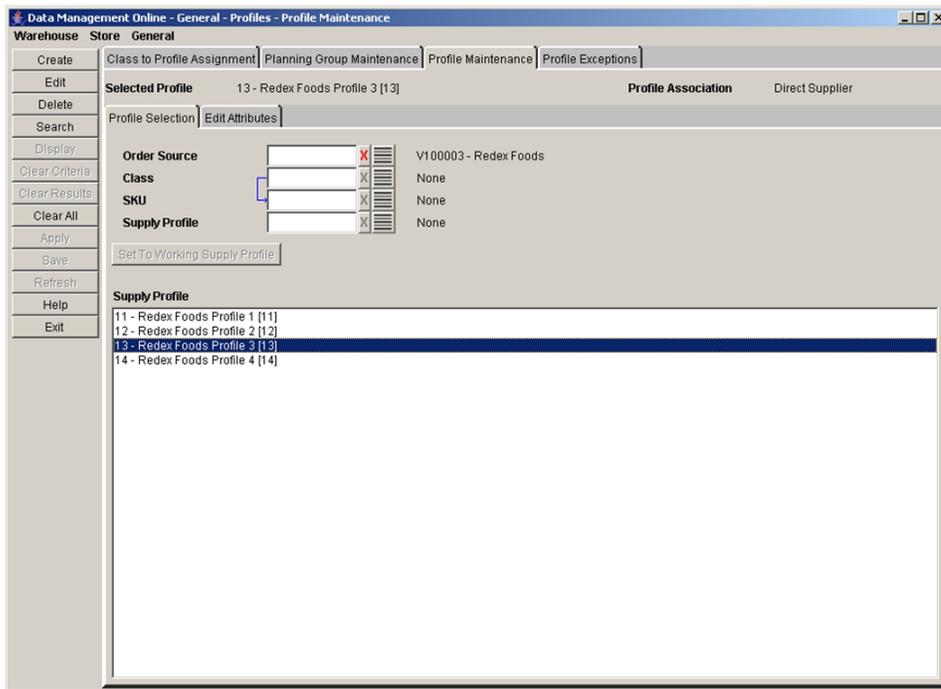
The screenshot displays the 'Store Order Cycle' tab within the 'Profile Maintenance' section. The 'Effective Date' is set to 09/14/2006. The 'Store Order Cycle' field is currently set to 'None'. Below this, there is a calendar grid for the month of September, showing days 14 through 27. The 'Current Store Order Cycle' field is empty. At the bottom, there is a 'Default Settings' section with a grid for selecting days of the week (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

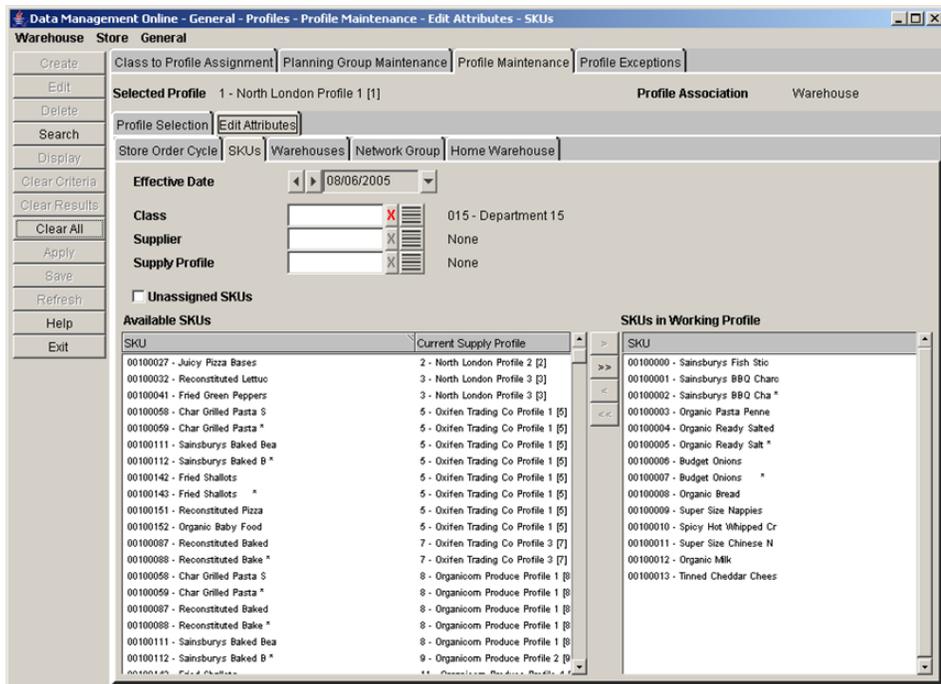
Navigate: Log into Data Management. From the General menu, select Profiles. From the Profile Maintenance primary tab, click the Profile Selection secondary tab.

Figure 3–28 Profile Selection Tab



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

Figure 3–29 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.

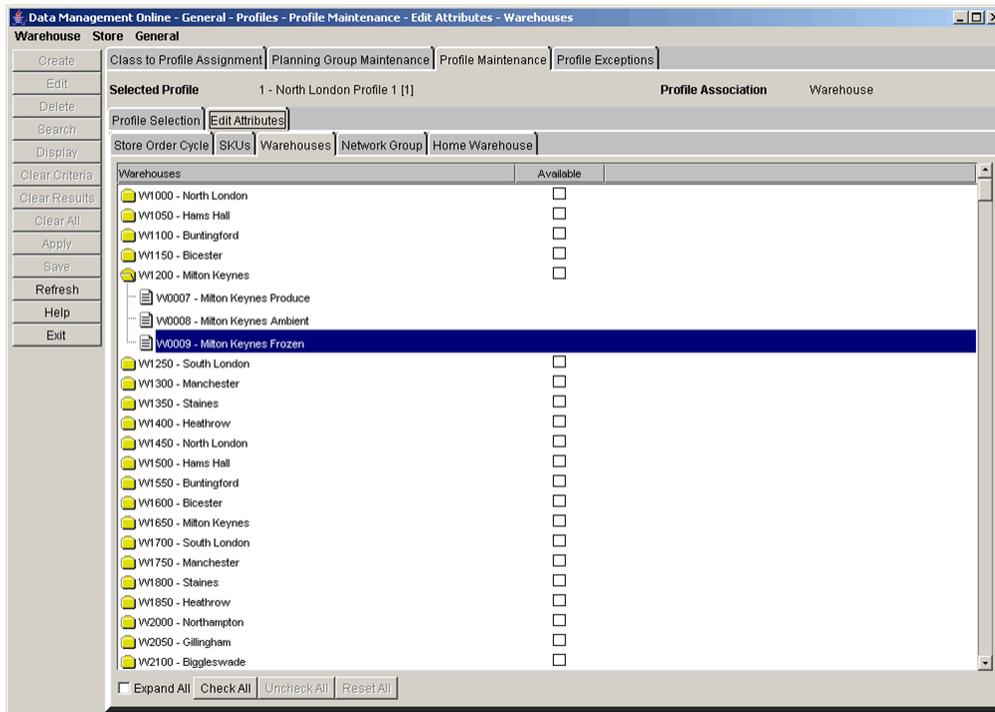
7. Click **Save**. You are prompted to confirm your decision.
8. Click **OK**.

Maintain the Warehouse Assigned to a Profile

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

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

Figure 3–30 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**.

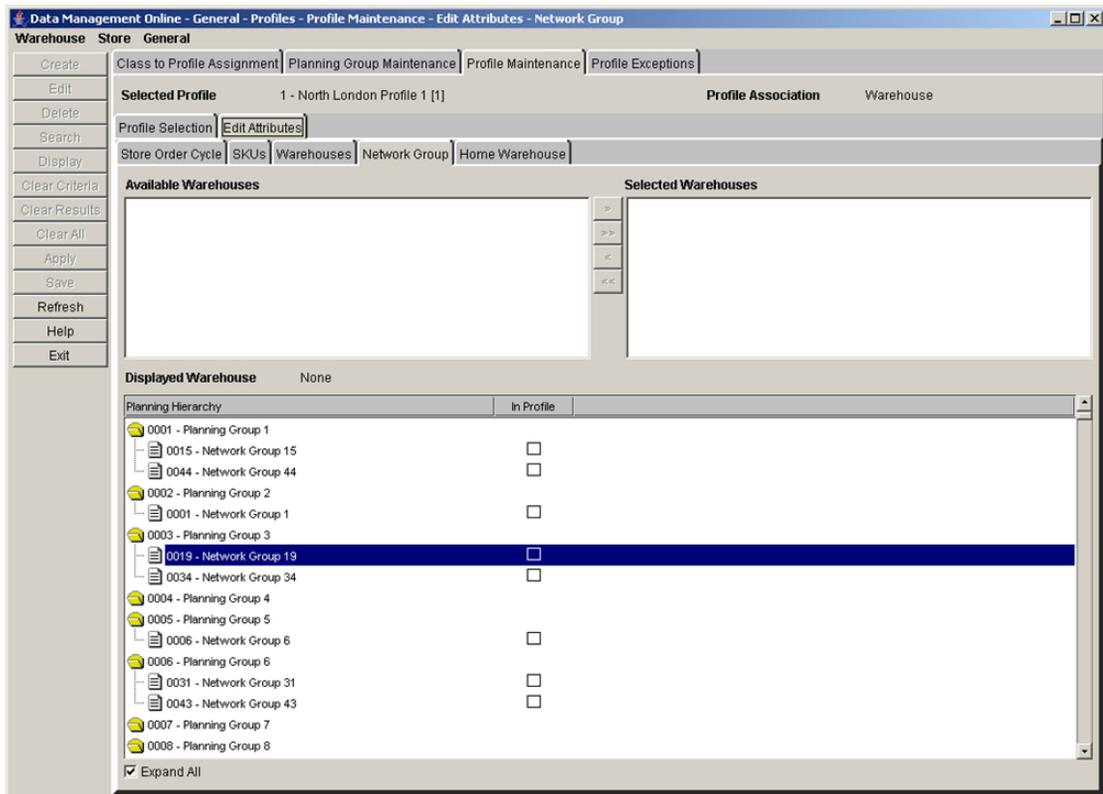
Maintain Network Groups for a Profile

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

1. Set a profile as a working profile.

2. Click the Edit Attributes tab.
3. Click the Network Group tab. The warehouses assigned to the profile are displayed.

Figure 3–31 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. Click the Class to Profile Assignment tab.

Figure 3–32 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.

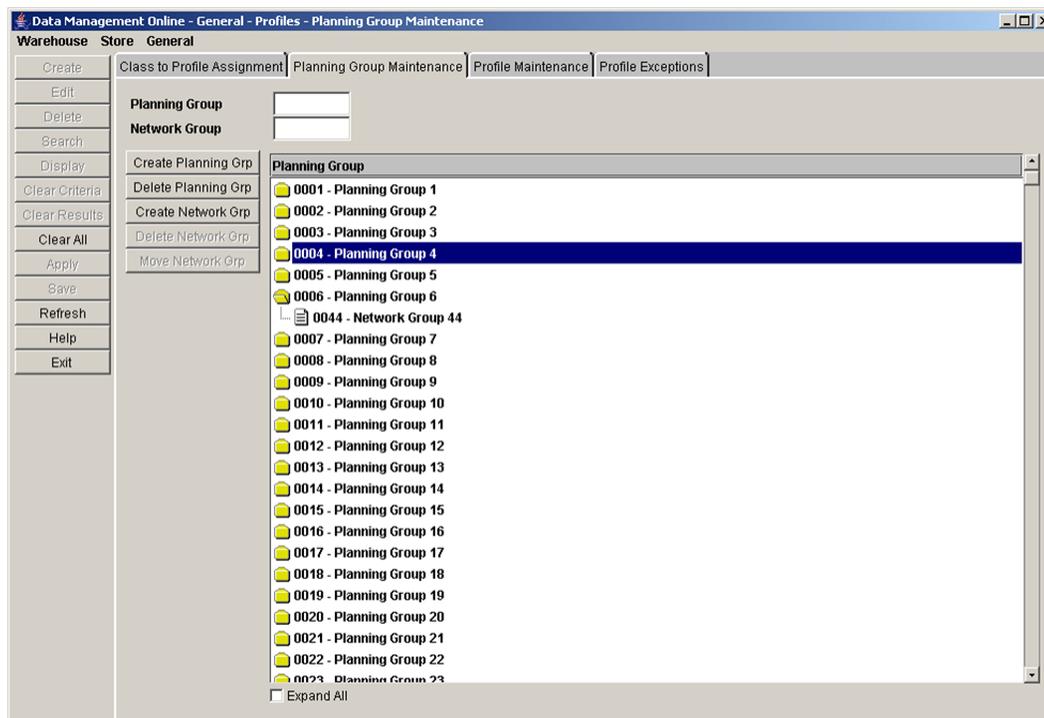
Table 3–6 Planning and Network Groups

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. Click the Planning Group Maintenance tab.

Figure 3–33 Planning Group Maintenance Tab



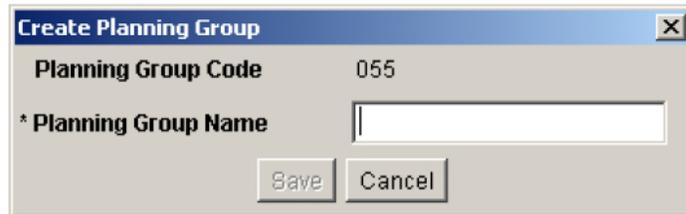
1. In the Planning Group field, enter the planning group ID.
2. In the Network Group field, enter the network group ID.
3. Press **Enter**. The first group that contains an ID that matches the search criteria is selected.

Create a Planning Group

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

1. Click **Create Planning Grp.** The [Create Planning Group Window](#) opens.

Figure 3–34 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. Click 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. Click 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**.

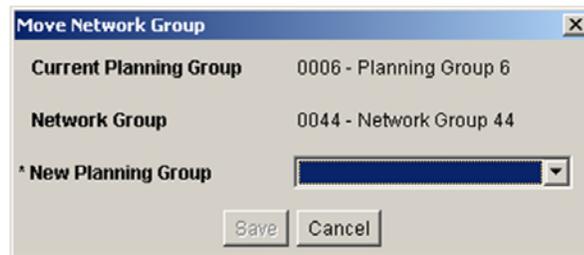
Move a Network Group

Navigate: Log into Data Management. From the General menu, select Profiles. Click 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 3–35 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. From the Profile Exceptions primary tab, click 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

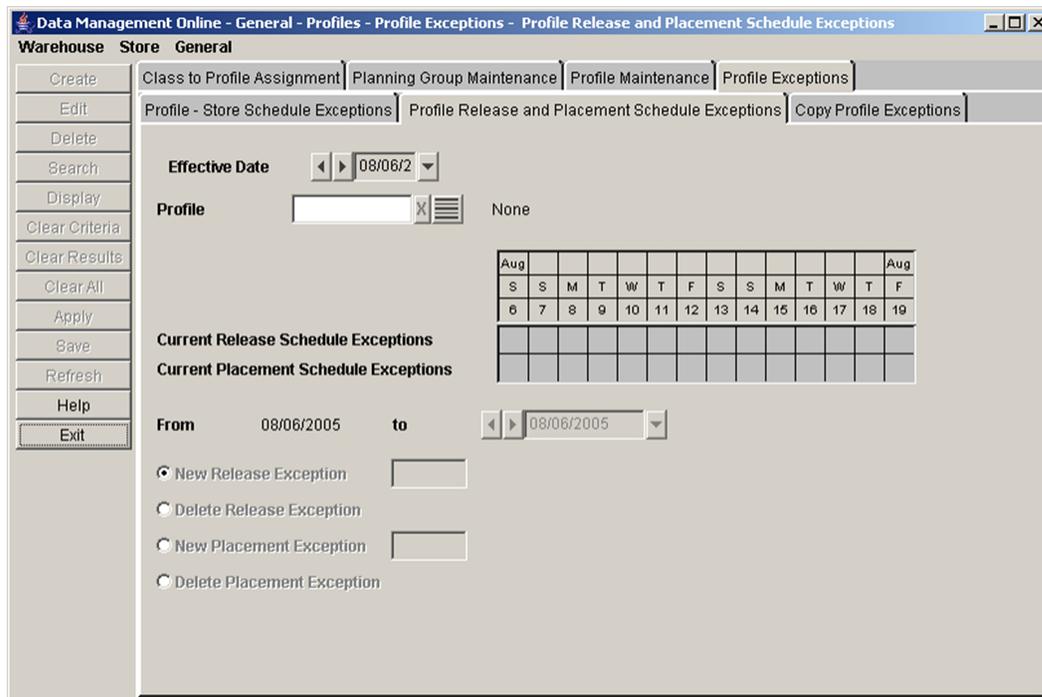
The release schedule for a profile is defined when you create the order cycle and assign it to a profile. After you associate an order cycle to a profile, you may need to create exceptions for a period of time. An exception to the order cycle at the profile level is always used instead of the default 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 3–36 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. From the Profile Exceptions primary tab, click the Profile Store Schedule Exceptions secondary tab.

Figure 3–37 Profile Store Schedule Exceptions Tab

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. From the Profile Exceptions primary tab, click 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. From the Profile Exceptions primary tab, click 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**.

Scaling

This section includes:

- [Define Smoothing and Scaling Settings](#)
- [Access the Warehouse Receiving Capacity Tab](#)

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. From the Supplier and Container Scaling Groups primary tab click the Select tab.

Figure 3–38 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:

Note: For the following criteria, SKU and Class are unique when choosing LOV selections. At minimum, two criteria must be selected that are not SKU or Class. If either SKU or Class are chosen, then two additional criteria must be selected. If both SKU and Class are chosen, then three additional criteria must be selected.

- **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. From the Supplier and Container Scaling Groups primary tab, click the Select tab.

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

Figure 3–39 Create Scaling Group Window

2. Complete the fields in the Create Scaling Group window as described in [Table 3–7](#).

Table 3–7 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.

Table 3-7 (Cont.) Create Scaling Group Window Fields

Field	Parameters	Use
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.

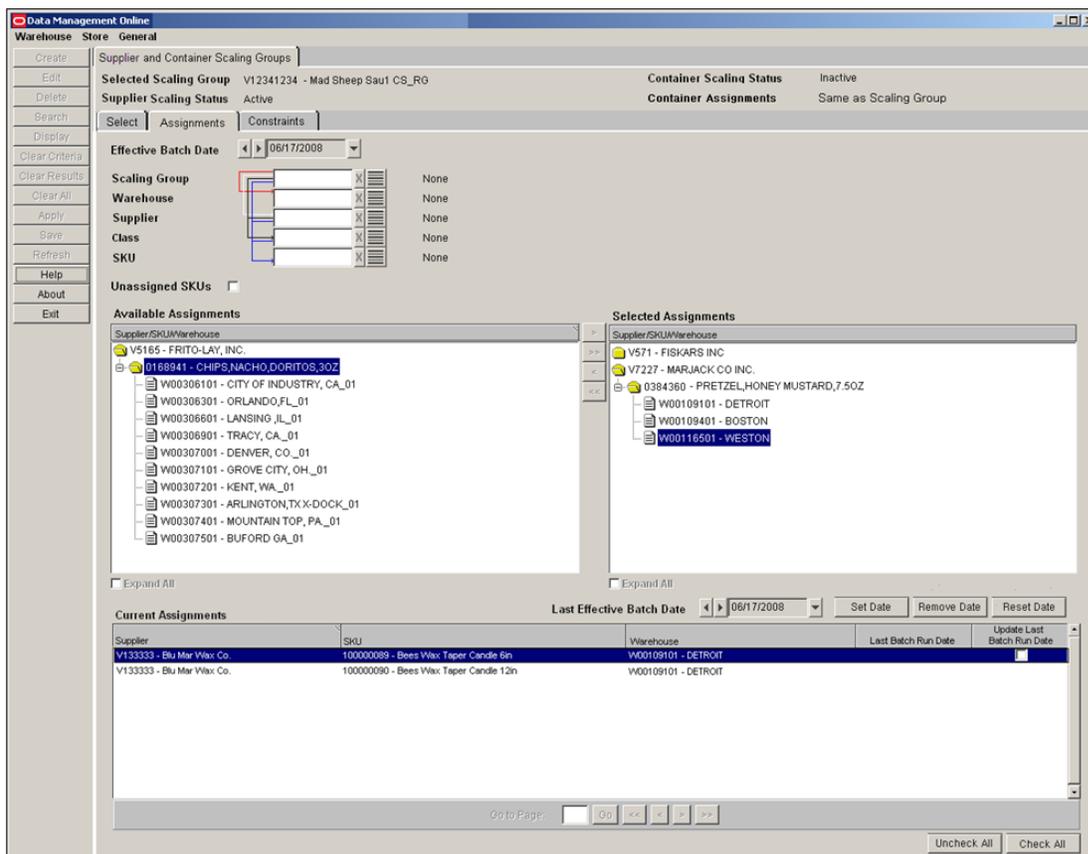
3. To save your Scaling Group, click **Save**.

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 click the Assignments tab.

Figure 3-40 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:

1. In the Effective Batch Date field, select an effective date using the calendar button.
2. Specify one or more of the following criteria to retrieve available assignments:
 - **Scaling Group:** Enter the scaling group ID, or click the LOV button and select a scaling group.
 - **Warehouse:** Enter the warehouse ID, or click the LOV button and select a warehouse.
 - **Supplier:** Enter the supplier ID, or click the LOV button and select a supplier.
 - **Class:** In the Class field, enter the class ID, or click the LOV button and select a class.
 - **SKU:** Enter the SKU ID, or click the LOV button and select a SKU.
 - **Unassigned SKUs:** Selecting this 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 3–8](#) to edit assignments:

Table 3–8 *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

Table 3–8 (Cont.) Editing Assignments for Scaling Groups Steps

To...	First...	And Then Click...
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, click the Constraints tab.

Figure 3–41 Supplier and Container Scaling Groups: Constraints Tab

Effective Release Date	To Release Date	Minimum	Maximum	Lock	Primary Container Constraint
11/02/2016	No end date	500		Cases	<input type="checkbox"/>
		500	1,000	Cases	<input checked="" type="checkbox"/>

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 click the Constraints tab.

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

Figure 3-42 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 with a list icon, showing 'V12341234 - Mad Sheep Sau1 CS_RG'. Below it is the 'Copy From Date' dropdown set to '03/16/2008' with a 'Copy' button. The 'Effective Release Date' is also set to '03/16/2008'. There are radio buttons for 'To Release Date' (unselected) and 'No End Release Date' (selected). The 'Supplier Constraints' tab is active, showing a 'Cost' section with 'Currency' set to 'USD' and a 'Minimum' input field. Below that is a 'Quantity' section with radio buttons for 'Pallets', 'Cases' (selected), and 'Eaches', and a 'Minimum' input field. At the bottom are 'Save', 'Clear', and 'Cancel' buttons.

Figure 3-43 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 with a list icon, showing 'V12341234 - Mad Sheep Sau1 CS_RG'. Below it is the 'Copy From Date' dropdown set to '01/25/2008' with a 'Copy' button. The 'Effective Release Date' is also set to '01/25/2008'. There are radio buttons for 'To Release Date' (unselected) and 'No End Release Date' (selected). The 'Container Constraints' tab is active, showing 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', 'Cases' (selected), and 'Eaches', with 'Minimum' and 'Maximum' input fields. The 'Cost' section has 'Currency' set to 'USD' and 'Minimum' and 'Maximum' input fields. At the bottom, there is a 'Primary Constraint' dropdown menu and a 'Tolerance' input field followed by a '%' sign. At the very bottom are 'Save', '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, click 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 [Edit Scaling Groups Constraints: Supplier Constraints Tab](#) or [Edit Scaling Groups Constraints: Container Constraints Tab](#), depending on which row was selected.

Figure 3-44 Edit Scaling Groups Constraints: Supplier Constraints Tab

The screenshot shows a software window titled "Edit Scaling Group Constraints" with a close button (X) in the top right corner. The window displays the following information and controls:

- Scaling Group:** V12341234 - Mad Sheep Sau1 CS_RG
- Effective Release Date:** A date picker set to 03/16/2008.
- Release Date Options:** Two radio buttons: "To Release Date" (unselected) and "No End Release Date" (selected). A second date picker is visible next to the "To Release Date" option.
- Supplier Constraints Tab:** The "Supplier Constraints" tab is selected, with "Container Constraints" also visible.
- Cost Section:**
 - Currency:** USD
 - Minimum:** An empty text input field.
- Quantity Section:**
 - Type:** Three radio buttons: "Pallets" (unselected), "Cases" (selected), and "Eaches" (unselected).
 - Minimum:** An empty text input field.
- Buttons:** "Save", "Reset", and "Cancel" buttons are located at the bottom of the window.

Figure 3–45 Edit Scaling Groups Constraints: Container Constraints Tab

The screenshot shows the 'Edit Scaling Group Constraints' dialog box with the 'Container Constraints' tab selected. The dialog is titled 'Edit Scaling Group Constraints' and contains the following information:

- Scaling Group:** V12341234 - Mad Sheep Sau1 C8_RG
- Effective Release Date:** 01/25/2008
- To Release Date:** (empty)
- No End Release Date:** (checked)
- Supplier Constraints:** (tab)
- Container Constraints:** (active tab)
- Volume:** UOM: Cubic Feet; Minimum: (empty); Maximum: (empty)
- Weight:** UOM: Pounds; Minimum: 22000.00; Maximum: 25000.00
- Quantity:** Type: Pallets (selected), Cases, Eaches; Minimum: 25; Maximum: 28
- Cost:** Currency: USD; Minimum: (empty); Maximum: (empty)
- Primary Constraint:** Quantity
- Tolerance:** 0 %
- Buttons:** Save, Reset, Cancel

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 click the Select tab.

1. Follow the steps for [Selecting and Viewing Assignments for Scaling Groups](#).
2. Click 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. The Select tab appears. Follow the instructions in Help to [Set a Working Scaling Group](#). Click the Warehouse Receiving Capacity tab.

Figure 3–46 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.

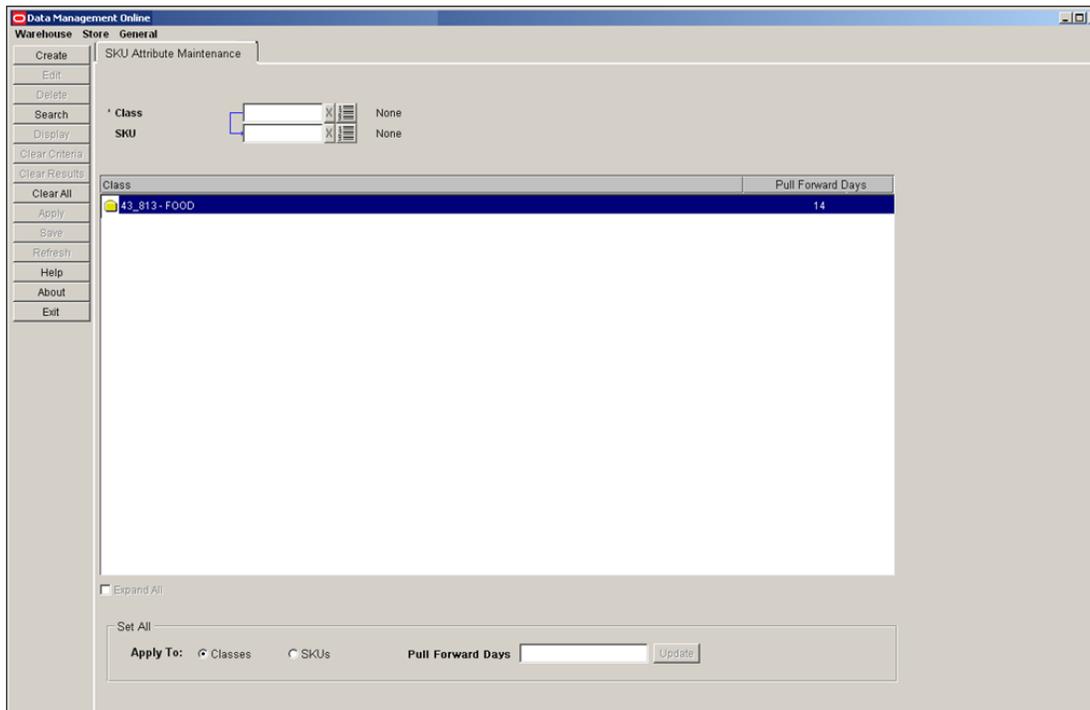
Pull Forward Days is a maximum number of days which a purchase order's delivery date can be moved ahead of its original delivery date during Supplier Scaling or Container Scaling. To set this value the business should first do a cost/benefit analysis of storing extra inventory versus the expected efficiencies/savings 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.

Note: Scaling does not make any special recognition of perishable goods. Perishable goods are managed by the limitations of Pull Forward Days.

Search for Classes and SKUs

Navigate: Log into Data Management. From the General menu, select Scaling. Click the [SKU Attribute Maintenance Tab](#).

Figure 3–47 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. Click the [SKU Attribute Maintenance Tab](#).

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. Click the [SKU Attribute Maintenance Tab](#)

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**.

Event Management

Events are created to mark out-of-the-ordinary occurrences at a location or in the supply chain that require additional monitoring by you and may require special steps in replenishment to aid a transition.

Use the Events window to find events, identify events, and to apply Promotion with Variant events, or Replacement SKU events.

These events are created with a set of event-level attributes that can be applied to all assigned stores and their related sources. The event level attributes can be overridden by applying a different value to a specific location.

Promotion with Variant Events

A Promotion with Variant Event marks a period of time where a set of stores (usually more than one) are promoting a variant SKU and the replenishment of both the variant SKU and the standard selling SKU may converge near the end of the promotion.

Replacement SKU Events

Similarly, a Replacement SKU event marks a situation where a set of stores (usually more than one) are phasing out one SKU and introducing another replacement model. Replenishment of the new SKU may converge with the inventory of the old near the end of the product's sales life.

Pack Change Events

Pack Change events may be created to aid you in creating a wide-spread pack change or assist in the transition of packs at the warehouse.

Search for Events

Navigate: Log into Data Management. From the General menu, select Events. Click the Event Selection tab.

Figure 3–48 Event Selection Tab

1. Specify one or more of the following criteria to retrieve events:
 - **From:** Select the date for the beginning event period.
 - **To:** Select the date for the ending event period.
 - **Event Type:** In the Event Type list, leave blank or select either Promotion With Variant, Replacement SKU, or Pack Change
 - **Event:** In the Event field, enter the event, or click the LOV button and select an event.
 - **Class:** In the Class field, enter the class, or click the LOV button and select a class.
 - **Event SKU:** In the Event SKU field, enter the event SKU, or click the LOV button and select an event SKU.
 - **SKU:** In the SKU field, enter the SKU, or click the LOV button and select a SKU.
 - **Location:** In the Location field, enter the location, or click the LOV button and select a location.
 - **Status:** In the Status list, leave blank or select either Worksheet, Open, Changes Pending, Cancel Pending, Canceled, or Closed.
2. Click **Search**. The Event area displays the Events that match your criteria.

Note: Click **Clear Criteria**, **Clear Results** or **Clear All** to reset the search, results, or everything in the Event window.

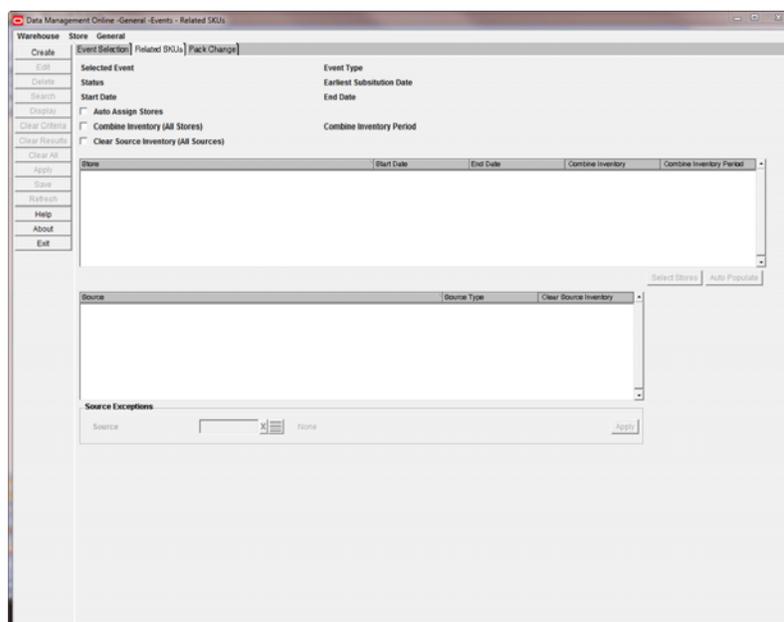
Working with Promotion with Variant Events or Replacement SKU Events

Navigate: Log into Data Management. From the General menu, select Events. Click the Event Selection tab.

This tab allows you to create, view, edit, modify, and delete Promotion with Variant events or Replacement SKU events

1. Access a previously saved event as described in the section, [Search for Events](#) and select either Promotion With Variant or Replacement SKU.
2. In the Event area, double-click either a Promotion with Variant or Replacement SKU event to open the [Related SKUs Tab](#).

Figure 3–49 Related SKUs Tab



Creating New Promotion with Variant Events or Replacement SKU Events

To create new events, perform the following:

1. Create a new event by clicking **Create** from the [Related SKUs Tab](#) to open the [Create Event Window](#).

Figure 3–50 Create Event Window

The screenshot shows the 'Create Event' dialog box with the following fields and options:

- Event Code: [Text Field]
- * Event Name: [Text Field]
- * Type: [Dropdown Menu]
- * Status: [Dropdown Menu]
- Class: [Text Field] with a LOV button
- * Event SKU: [Text Field] with a LOV button
- SKU:
 - Transfer Customer Order to Event SKU
 - SKU is Valid Substitute
 - Earliest Substitution Delivery Date: [Date Picker] with a Clear button
- Combine Inventory (All Stores):
 - Combine Inventory (All Stores)
 - Combine Inventory Period: [Text Field] Days
 - Clear Source Inventory (All Sources)
- Buttons: Save, Cancel

2. Enter the information needed to create your new event:
 - **Event Name:** Enter a name for your event, up to 120 characters
 - **Type:** Select an option from either: blank, **Promotion With Variant SKU**, or **Replacement SKU**. The Event SKU field is unavailable when the Type selected is blank. The Transfer Customer Order to Event SKU check box is available when the Type selected is **Promotion With Variant SKU**.
 - **Status:** Select an option from either: blank, **Worksheet**, or **Open**. The **Worksheet** status cannot be used by Replenishment calculations. You must assign stores to the event to use the **Open** status.
 - **Class:** In the Class field, enter the class, or click the LOV button and select a class.
 - **Event SKU:** In the Event SKU field, enter the Event SKU, or click the LOV button and select an event SKU. For a **Promotion With Variant SKU** event the Event SKUs are the variant SKUs. For a **Replacement SKU** event the Event SKU is the old SKU being replaced by the new.
 - **SKU:** Once an Event SKU is selected the read-only SKU field is automatically populated with the related SKU.
 - **Transfer Customer Order to Event SKU:** The Transfer Customer Order to Event SKU check box is available when the Type selected is **Promotion With Variant SKU**.
 - **SKU is Valid Substitute:** Selecting this check box indicates that the related SKU can be sent in place of the Event SKU if a shortage occurs.
 - **Earliest Substitution Delivery Date:** This optional field is available when the **SKU is Valid Substitute** check box is selected. Allows you to select any date from tomorrow.
 - **Combine Inventory:** Selecting this check box enables the Combine Inventory Period text box, and the Clear Source Inventory check box. Indicates that the store inventory of the Event SKU will be added to the store inventory of the Related SKU after the store event end date, and for the period of time specified by the Combine Inventory Period.

- **Combine Inventory Period:** Available when the **Combine Inventory** check box is selected. Enter up to 99 days for the time period to combine inventory.
 - **Clear Source Inventory:** Available when the **Combine Inventory** check box is selected. Indicates that the source should attempt to replenish and distribute the related SKU considering leftover inventory of the Event SKU at the source
3. Click **Save** to create your new event, You are prompted to confirm your decision.

Modifying Promotion with Variant Events or Replacement SKU Events

To modify events, perform the following:

1. Access a previously saved event as described in the section, [Search for Events](#) and for Event Type, select Pack Change..

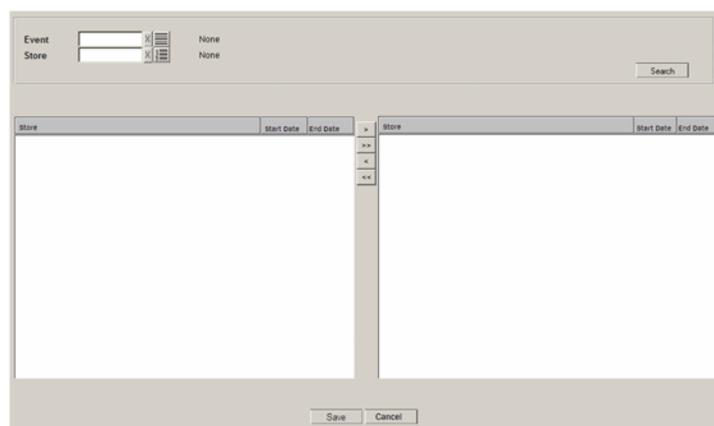
Note: When the event's status is either Closed or Canceled, then all fields are display-only and you cannot edit stores or exception sources

2. Set or change the event's values:
 - a. For Promotion with Variant events, set or change the store's promotion start date and end date
 - b. For Replacement SKU events, set or change the merchandise changeover start date
 - c. Set or change the Combine Inventory flag.

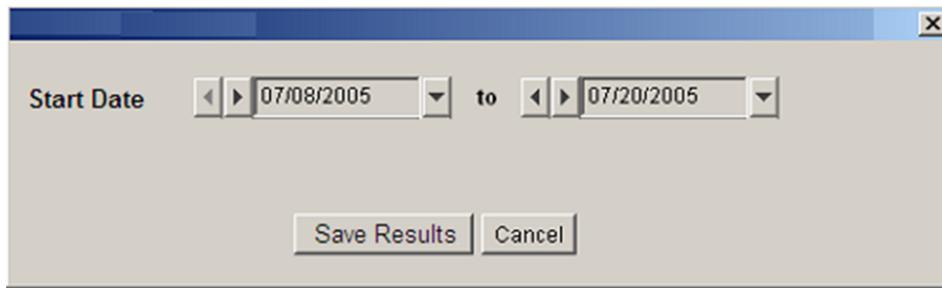
Note: When the Combine Inventory flag is selected, you can override this by entering a period of 0 days for the store. The store level value takes priority over the event level, and a setting of 0 days nullifies any effects.

- d. Set or change the Combine Inventory Period
3. Click **Select Stores** to open the [Store Selection Window](#) to search for Stores to add or move into the currently selected event.

Figure 3–51 Store Selection Window



4. Click **Auto Populate** to open the [Automatic Store Population Window](#)

Figure 3–52 Automatic Store Population Window

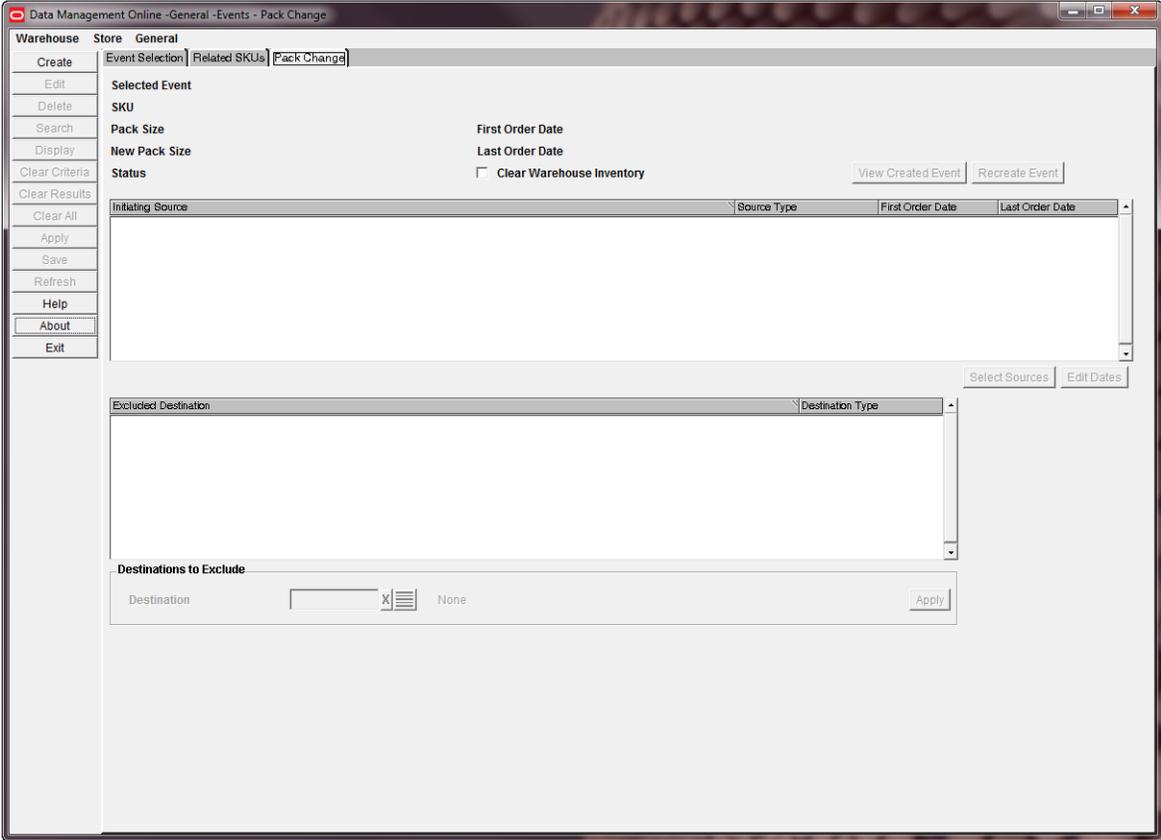
5. The Source area allows you to search for all suppliers and warehouses in the system and add them as exception sources.
 - a. Click the LOV button and select any suppliers and warehouses
 - b. Select the source and click **Apply** to add it as an exception source to the event.
 - c. Select the source and click **Delete** to permanently delete the source exception record from the event
6. Click **Save**. You are prompted to confirm your decision.

Working with Pack Change Events

Navigate: Log into Data Management. From the General menu, select Events. Click the Pack Change tab.

This tab allows you to create, view and modify, Pack Change events as well as, view all locations receiving the pack change once the event is spread.

Figure 3-53 Pack Change Tab

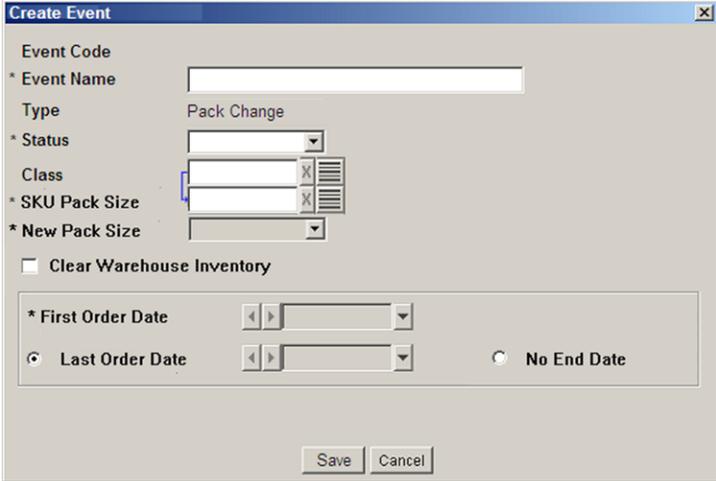


Creating New Pack Change Events

To create a new Pack Change events perform the following:

- 1. Create a new event by clicking **Create** from the **Pack Change Tab** to open the **Create Event Window**.

Figure 3-54 Create Event Window



2. Enter the information needed to create your new event:
 - **Event Name:** Enter a name for your event, up to 120 characters
 - **Type:** Read-only field for Pack Change.
 - **Status:** Select an option from either: blank, **Worksheet**, or **Open**) The **Worksheet** status cannot be used by Replenishment calculations. You must assign stores to the event to use the **Open** status.
 - **Class:** In the Class field, enter the class, or click the LOV button and select a class.
 - **SKU Pack Size:** In the SKU Pack Size field, enter the SKU Pack Size, or click the LOV button and select a SKU Pack Size.
 - **New Pack Size:** Once a SKU Pack Size is selected the read-only New Pack Size field is automatically populated with the list of all other packs of the SKU and blank.
 - **Clear Warehouse Inventory:** The Clear Warehouse Inventory check box is available and the default setting is clear.
 - **First Order Date:** The First Order Date editor allows selection of a date starting from tomorrow, but no further than a year ahead.
 - **Last Order Date:** The Last Order Date editor allows selection of a date starting from tomorrow, but no further than a year ahead; or the option to select **No End Date**.
3. Click **Save** to create your new event, You are prompted to confirm your decision.

Recreating Pack Change Events

To recreate a Pack Change event perform the following:

1. Access a previously saved event as described in the section, [Search for Events](#).

Note: Pack Change events in either Worksheet or Changes Pending status cannot be recreated.

2. Click **Save** if there are unsaved changes.
3. Click **Recreate Event**.
4. You are prompted to confirm your decision. Click **OK** to recreate the event or **Cancel** to stop.

Note: The event is saved in a status of Changes Pending to indicate that it should be recreated at the first available opportunity.

Modifying Pack Change Events

To modify events, perform the following:

1. Access a previously saved event as described in the section, [Search for Events](#) and for Event Type, select Pack Change.

Note: When the event's status is either Closed or Canceled, then all fields are display-only and you cannot edit stores or exception sources

2. Click **Edit** to open the [View Created Event Window](#).

Figure 3–55 Edit Event Window

3. Set or change the event's values:

Note: The Event Code, Type, SKU Pack Size, and New SKU Pack Size are read-only fields

If the Event Status is Cancel Pending, or Canceled, then only the Status field is available.

- a. Set or change the Event Name.
- b. Set or change the Status to these options: Blank, Worksheet, Open or Changes Pending, Cancel Pending or Canceled.

Note: Events are automatically set to a status of Closed after a predetermined period of time has passed once the pack change is completed.

A permanent pack change is complete after all locations have reached the point where they are ordering the new pack.

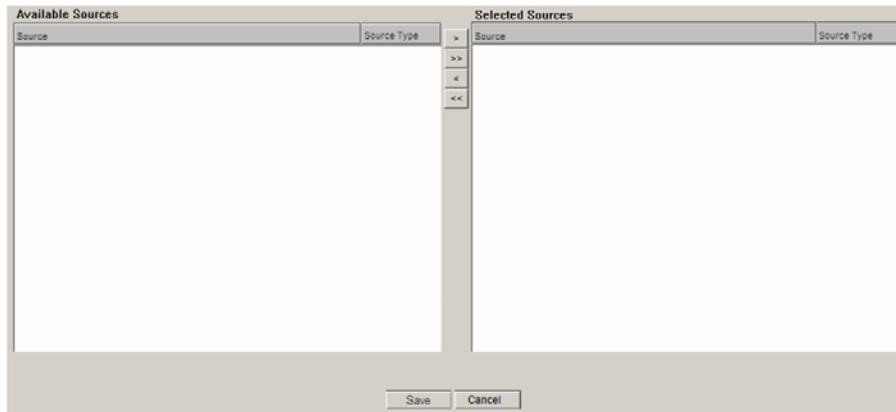
A temporary pack change is complete once all locations have reached the end date and have reverted back to ordering the old pack.

When a permanent pack change is closed, the change is finalized by setting the new pack size to the orderable unit that can be viewed and maintained.

- c. Select or clear the Clear Warehouse Inventory check box.
- d. Set or change the date for the First Order Date date editor. Tomorrow is the first available date.
- e. Set or change the option and date for the Last Order Date date editor. Tomorrow is the first available date.

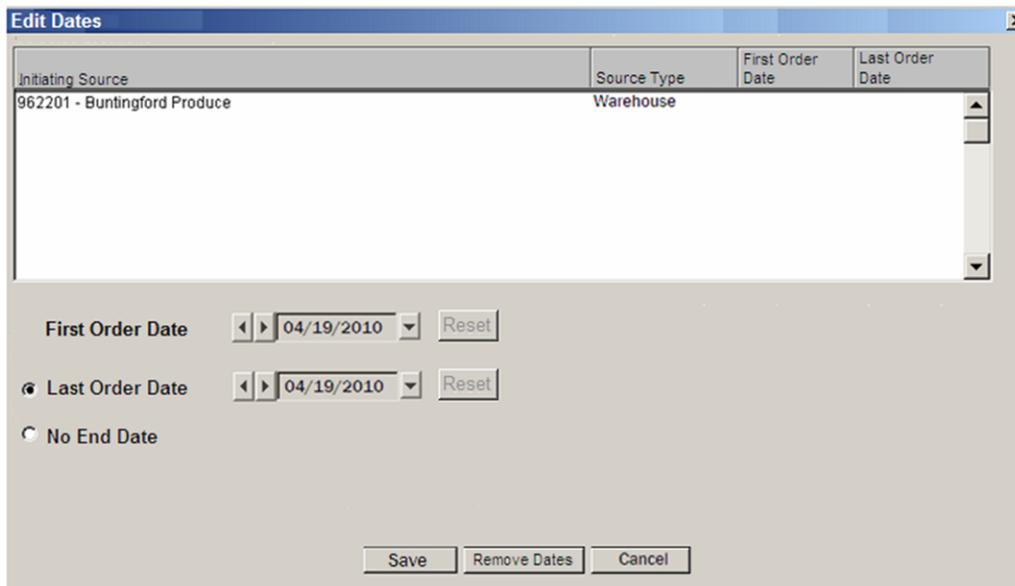
4. Click **Select Source** to open the [Source Selection Window](#) to search for Source to add or move into the currently selected event.

Figure 3–56 Source Selection Window



5. Click **Edit Dates** to open the [Edit Dates Window](#)

Figure 3–57 Edit Dates Window



6. The Initiating Source area lists all initiating sources and allows you to add, edit, or remove source-specific Pack Change Event order dates.
 - a. **First Order Date:** The First Order Date editor allows new selections of a date starting from tomorrow, but no further than a year ahead. Click **Reset** to reset a pre-populated First Order Date, which may be in the past.
 - b. **Last Order Date:** The Last Order Date editor allows selection of a date starting from tomorrow, but no further than a year ahead. Click **Reset** to reset a pre-populated Last Order Date, which may be in the past.

Note: Select the option **No End Date** if you do not want a Last Order Date.

7. To permanently delete any dates shown in the Initiating Source area, click **Remove Dates**. You are prompted to confirm your decision.
8. Click **Save**. You are prompted to confirm your decision.

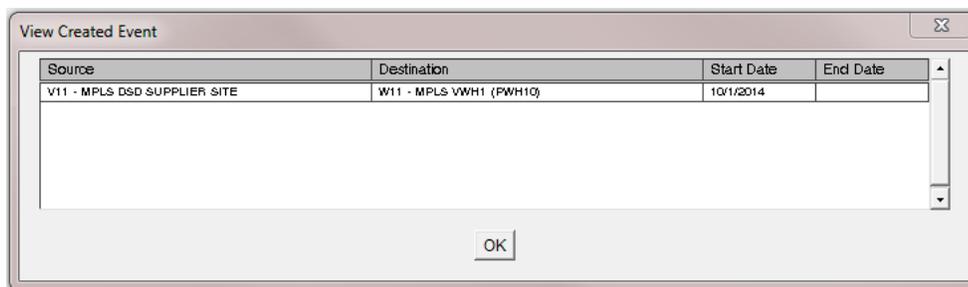
Viewing Pack Change Events

To view Pack Change events, perform the following:

1. Access a previously saved event as described in the section, [Search for Events](#) and for Event Type, select Pack Change.
2. Click **View Created Event** to open the [View Created Event Window](#).

Note: When the event's status is Worksheet, the **View Created Event** button is unavailable.

Figure 3–58 *View Created Event Window*



3. DM displays any source/destination combinations that have had the pack change applied. Click **OK** to close the window.

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](#)

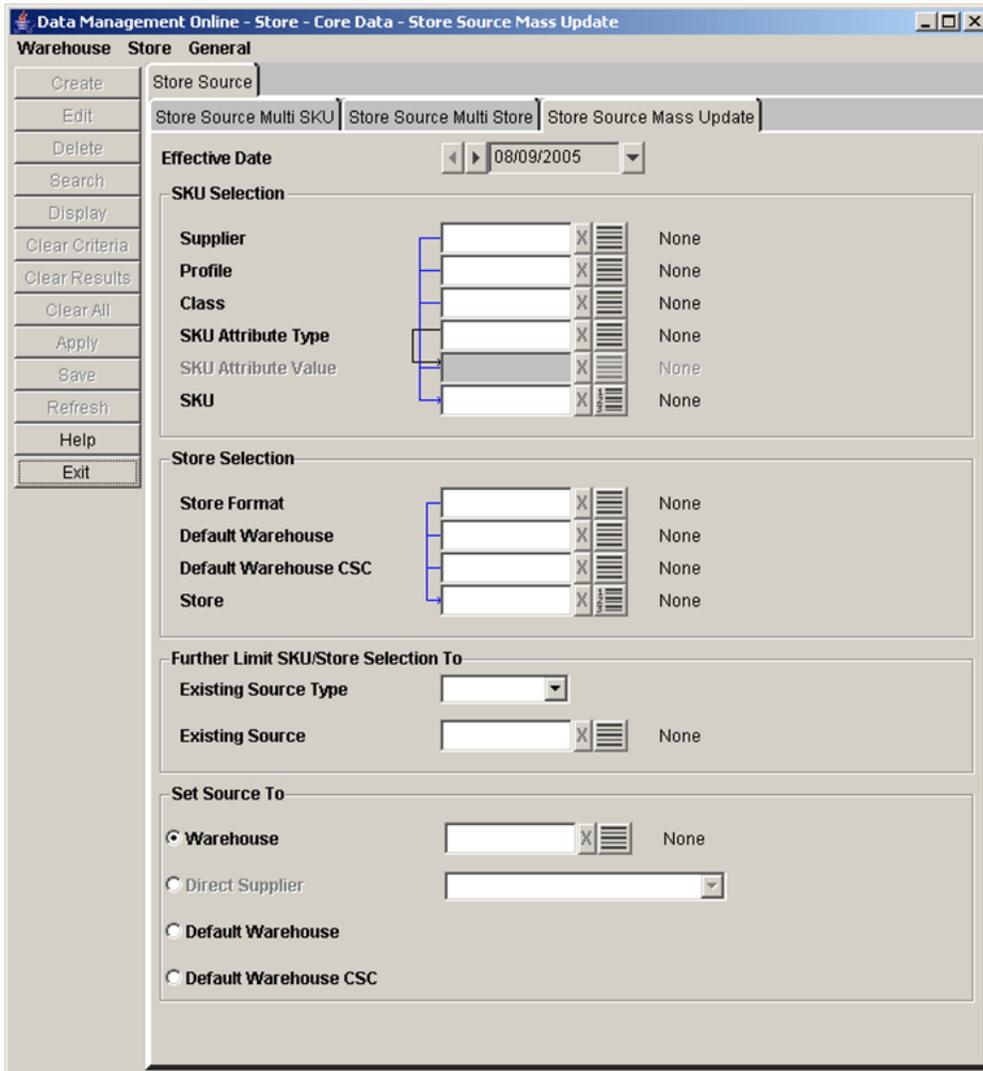
Perform a Mass Update of the Store Sources

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 displays the 'Data Management Online - Store - Core Data' application window. The 'Store Source' tab is active, and the 'Store Source Multi SKU' sub-tab is selected. The interface includes a left-hand menu with options like Create, Edit, Delete, Search, Display, Clear Criteria, Clear Results, Clear All, Apply, Save, Refresh, Help, and Exit. The main area shows the 'Store Source Multi SKU' tab selected. It features an 'Effective Date' field set to 08/06/2005, a 'Profile' field set to None, a 'Store Format' field set to None, and fields for '* Store' (S000000001 - Wellingbridge) and '* Class' (001 - Department 1). Below these are 'Available SKUs' and 'Selected SKUs' lists. The 'Selected SKUs' list contains '00100149 - Budget Baby Food' and '00100355 - Spicy Hot Grapes'. A table below shows SKUs and their sources for various dates from 08/06/2005 to 08/12/2005. At the bottom, there are options for 'Repeating Pattern' and 'Effective Date', each with a source field and a 'Populate' button.

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

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 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

The screenshot shows the 'Store Priority' tab in the Data Management Online interface. The 'Store Format' is set to '1 - Traditional'. The 'Store' field is empty. The table below shows a list of stores with their respective priority levels.

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

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

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.

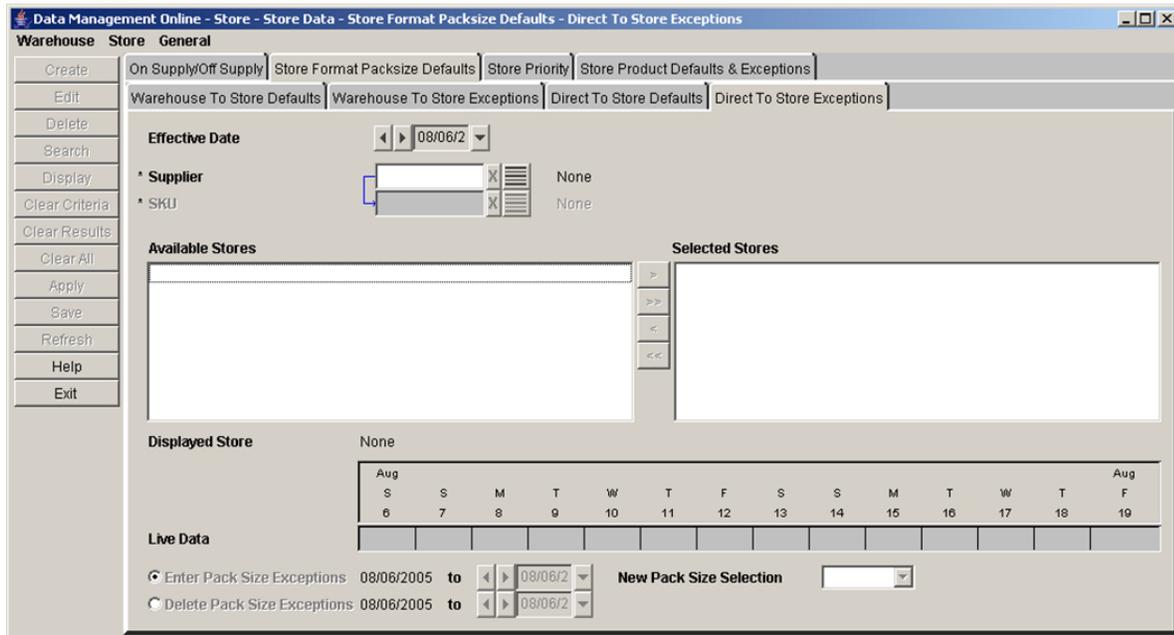
Note: The SKU-pack-sizes displayed are limited to the pack-sizes of the SKU available from the supplier.

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.

Note: Pack Change Events cannot be overridden in this window. Stores should be added to the excluded destinations list to manually change a pack size that is part of an Event.

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.

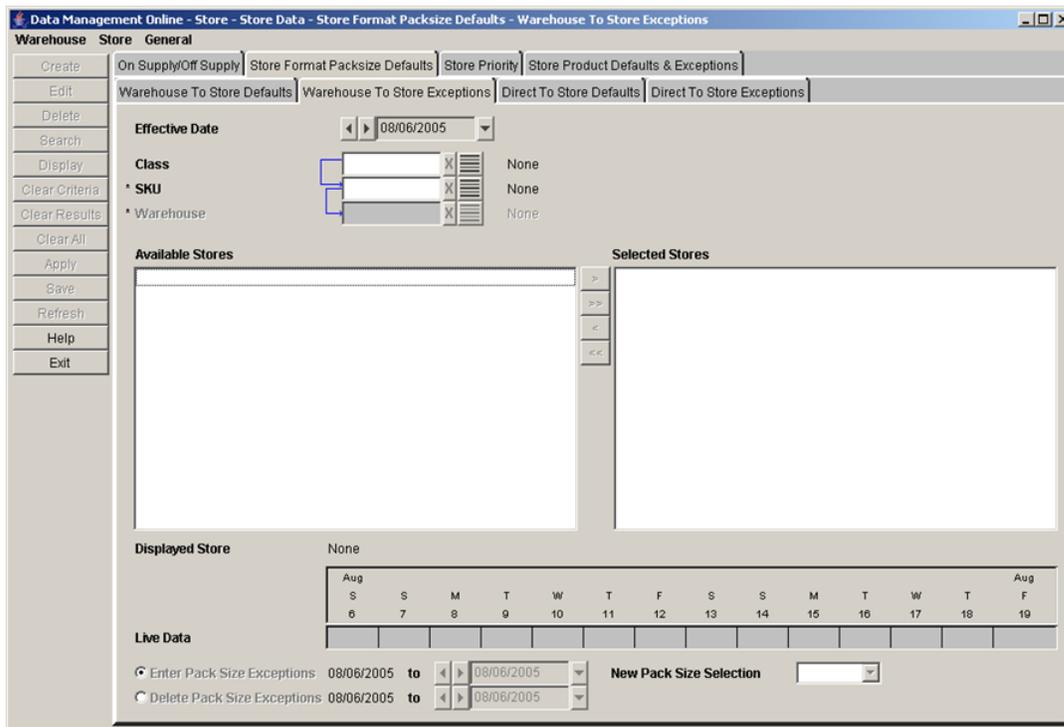
10. Click **Save**. You are prompted to confirm your decision.

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.

Note: Pack Change Events cannot be overridden in this window. Stores should be added to the excluded destinations list to manually change a pack size that is part of an Event.

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.

When setting the On-supply and Off-supply dates pick the actual dates you want to be planning replenishment receipts. The pre and post-supply dates (a range of 35 to 42 days) will enable additional Available to Plan (ATP) days before and after the

supply dates however they are not planned for replenishment. Only User Specified Allocations can be planned on the days outside of the supply dates.

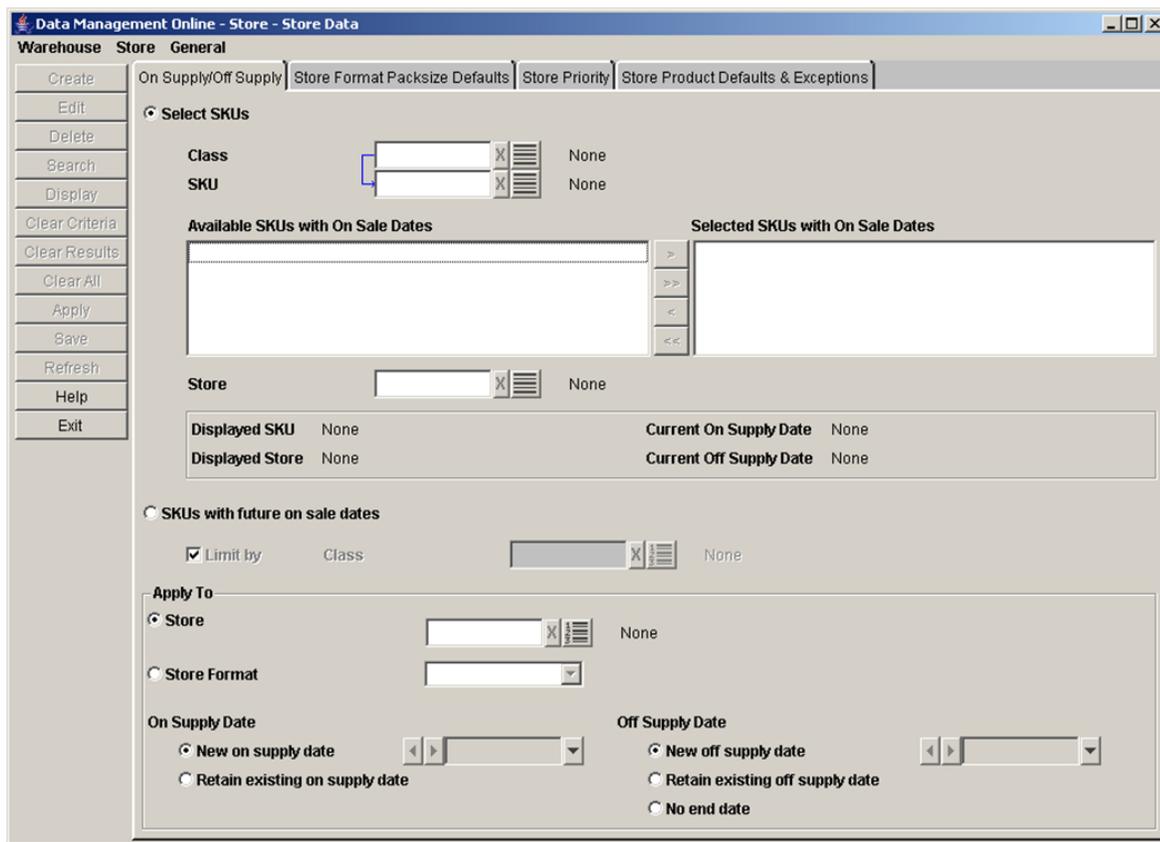
The On Supply/Off Supply tab allows you to modify the on supply/off supply dates which are initially generated in a nightly-batch process. This window also allows you to view a store's current on supply and off supply dates.

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 Store Exceptions

This section provides information on:

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

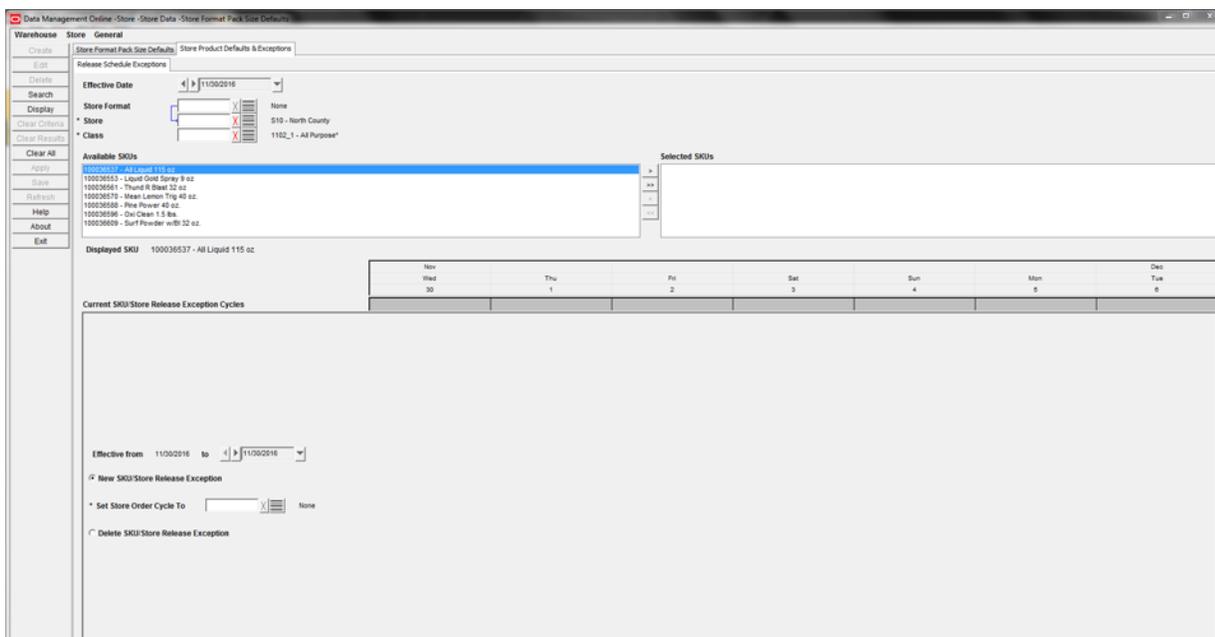
Maintain Exceptions to the Release and Placement Schedules

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 window 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 Schedule Exceptions secondary tab.

Figure 4–10 Release 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.

To Select a...	Then in the...
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

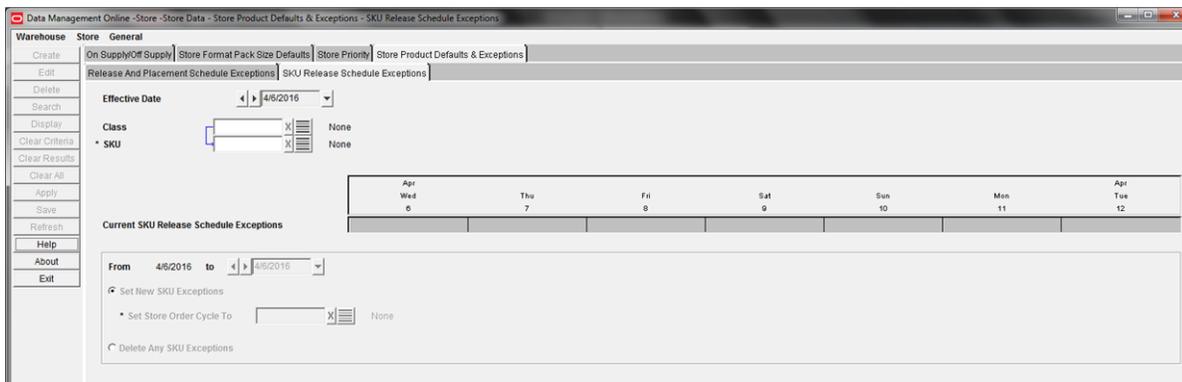
The SKU Release Schedule Exceptions window allows you to set exception to the SKU release and placement schedule at the SKU/day level. The exception is a new store order cycle that overlays the default order cycle.

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 4–11 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

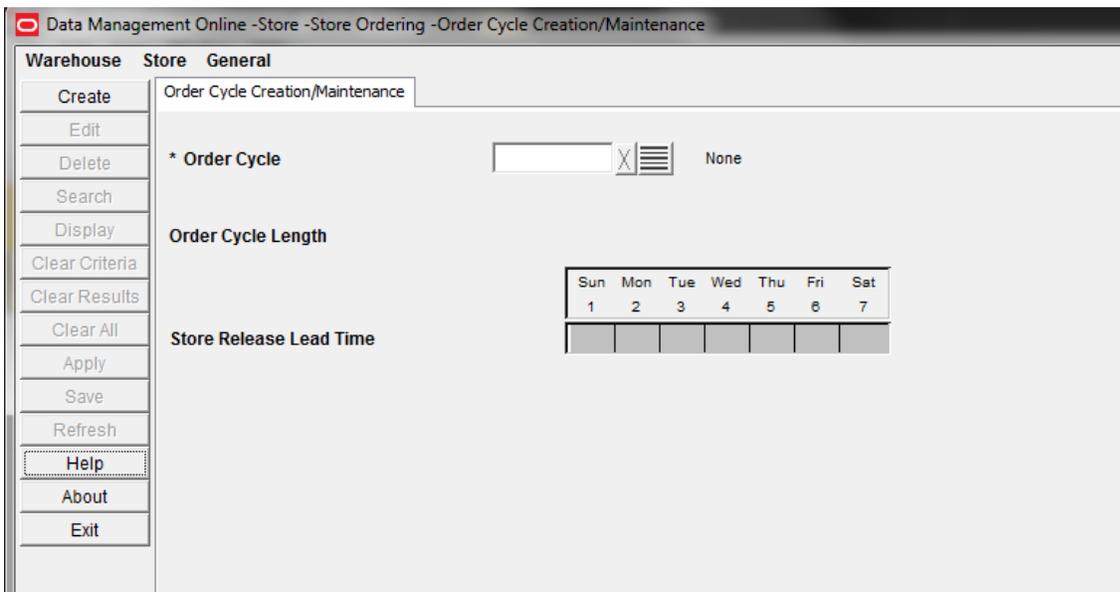
choose to make the placement lead time longer than the release lead time. One possible reason to set a different placement lead time is to fix the store order quantity so that orders into the store's source warehouse can be run with the confidence that the orders are sufficient to meet demand.

For each delivery there is a line to enter a release lead-time for every day in the cycle. If the Order Splitting Method is manual there is also a line for each delivery to enter a Split Percent for every delivery day.

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 4–12 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 4–13 Create Order Cycle Window

* Order Cycle Code: CYC81
 * Order Cycle Name: Order Cycle 81
 * Order Cycle Length: 7

Store Release Lead Time

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6	7
Delivery 1 Lead Time		1	1	1	1	1	
Delivery 1 Split Percent		50	50	50	50	50	
Delivery 2 Lead Time		1	1	1	1	1	
Delivery 2 Split Percent		50	50	50	50	50	

Order Splitting Method
 Time-based Manual

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**.

Using Order Splitting

When there is more than a single delivery per day associated with the Order Cycle then Order Splitting is available. Order Splitting can be either:

- Time-based
- Manual

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. If Order Splitting is available, there is a Split Percent row available beneath the Lead Time row.
2. If the Order Splitting method is Manual, then for every populated lead time, enter a split percentage for each delivery.

Note: Values for the split percentage are whole numbers between 1-99. The total split percent for that day across all delivers must equal 100.

3. Click **Save**.

Add 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 **Add Delivery**. An additional line is added
3. 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**.

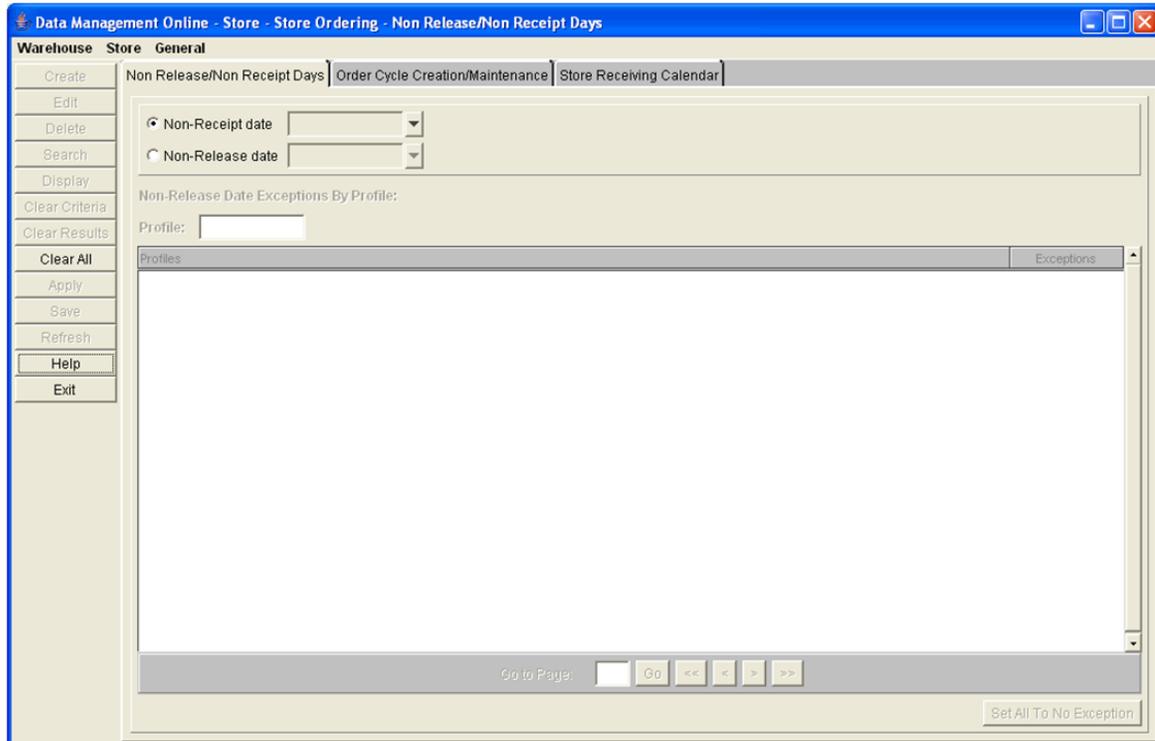
Define Non-Release and Non-Receipt Days

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 4–14 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:

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

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 5–1 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**.

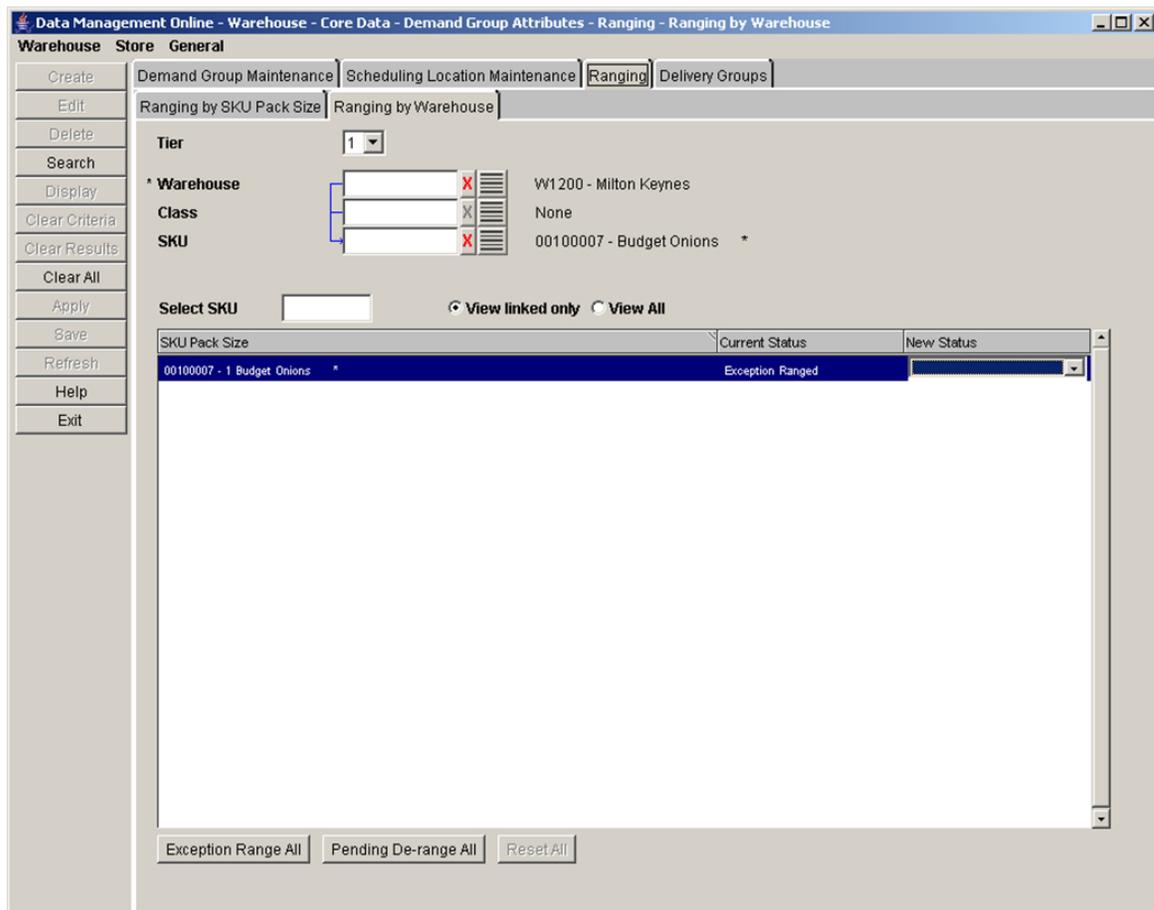
Range Locations by Warehouse

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 5–2 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

- Reconciliation Flag: When selected, the Reconciliation Flag indicates that any destinations are reconciled with the quantities available at the chamber. For

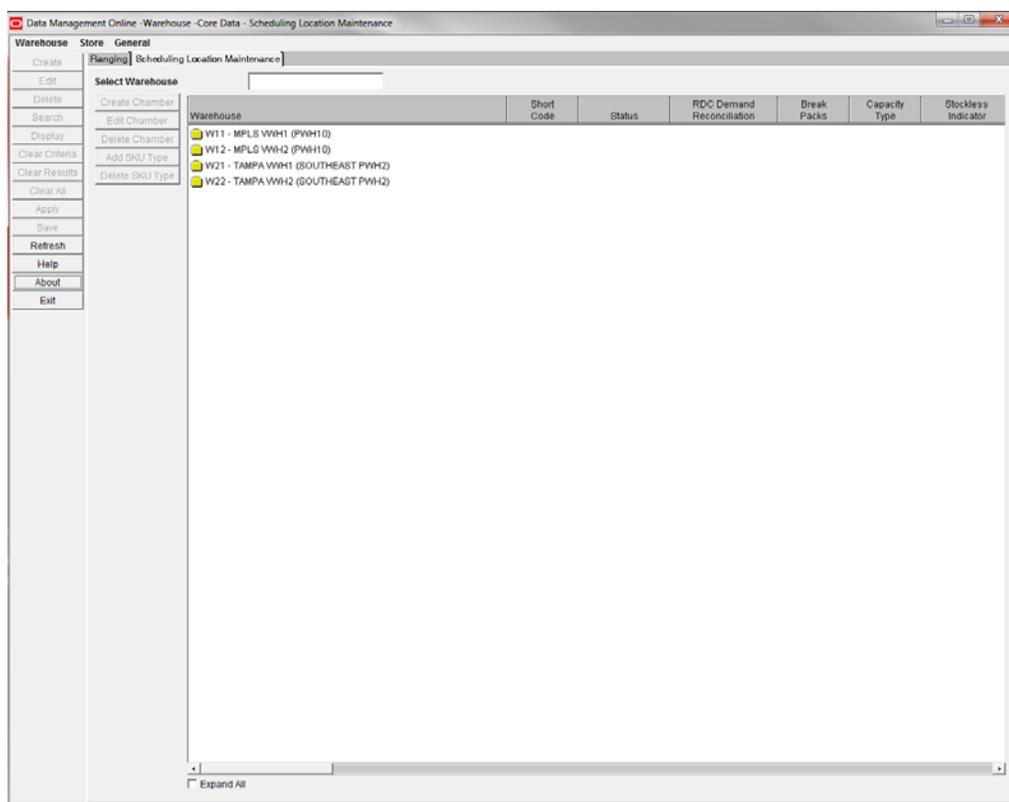
example, if the store demand is for five cases of SKU pack-size 10, and the warehouse only has SKU pack-size 15, the orders from the warehouse are reconciled against the need so that the store may get some quantity of the required SKU.

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 5–3 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 5–4 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. Check the Reconciliation Flag checkbox if store orders should be reconciled for the chamber.
7. Click **Save**. You are prompted to confirm your decision.
8. 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 5-5 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.

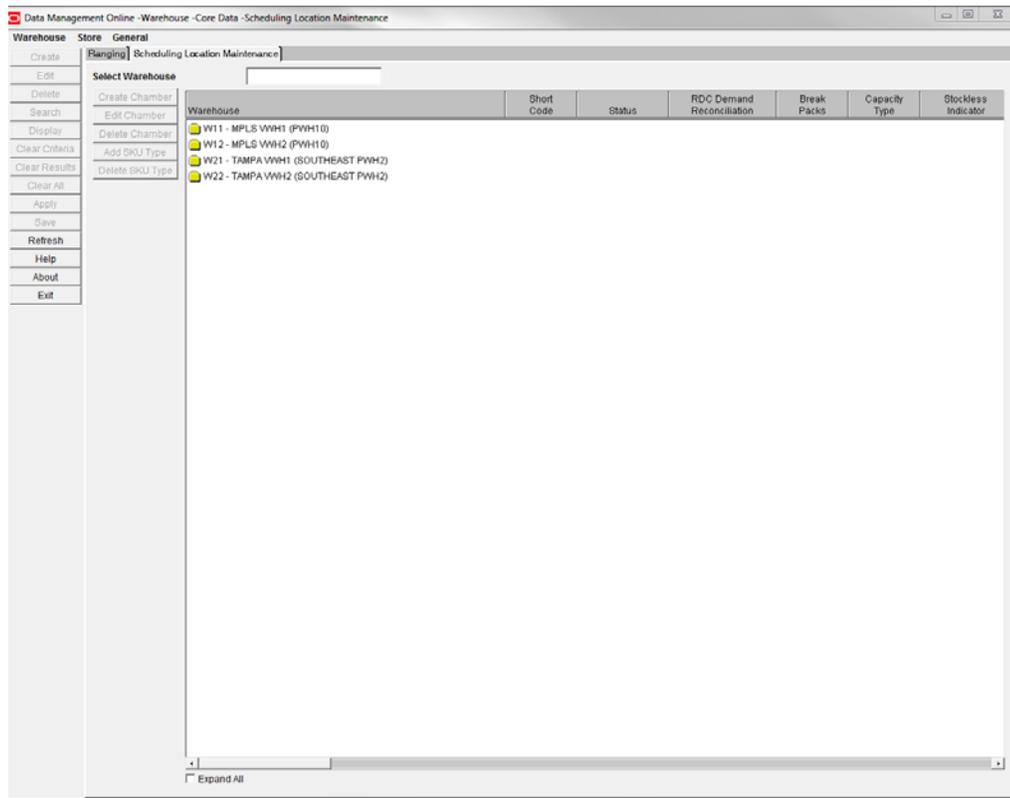
You can delete the last SKU type from a chamber only if the chamber status is New. You may add a SKU type to any warehouse chamber as long as its status is not Closed. Once you close the chamber any remaining SKU types are automatically removed.

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 5–6 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 5–7 Edit Chamber Window

Warehouse	W12 - MPLS VWH2 (PWH10)
Chamber Code	01
* Chamber Name	MPLS VWH2 (PWH10) 0
* Short Code	A1

Save Cancel

- 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 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**.

Pack Breaking

This section provides information on how to:

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

Pack Breaking by SKU

The Pack Breaking window allows you to specify which smaller packs are contained within a larger pack as well as the warehouses that are capable of breaking packs.

For each SKU pack size, you may specify whether that pack size can be broken into a smaller pack size of the same SKU and if so, what the smaller pack size is. The choices of which pack sizes a given pack can be broken into are limited to those smaller packs where the larger pack is a multiple of the smaller pack. A pack may only be broken into one other pack. That pack however, may itself be broken. This information is used for breaking packs into smaller quantities to meet demand.

The Pack Breaking window also displays the warehouses that are capable of breaking packs. This information is optional and is used in reconciliation when determining whether or not to break packs to meet store need.

Pack Breaking by SKU Pack Sizes

Navigate: Log into Data Management. From the Warehouse menu, select Core Data. and then select the Pack Breaking tab.

Figure 5–8 Pack Breaking Tab

1. Select the **SKU Pack Sizes** option.
2. Enter criteria to retrieve SKU pack sizes:
 - Class: Enter the Class ID, or click the LOV button and select a class.
 - SKU: Enter the SKU ID, or click the LOV button and select a SKU.
3. Click **Search** to populate the SKU Pack Sizes list.

Note: All pack sizes of the SKU display at the highest folder level. Any pack size that is currently saved as a breakable pack displays at a lower level.

4. Select the SKU pack size you want to break to populate the SKU Pack Size drop-down list.

Note: The SKU Pack Size drop-down list contains all smaller pack sizes where the selected larger pack size is a multiple of the smaller pack

5. To adjust the level of the selected pack size (from the SKU Pack Size drop-down list), either:
 - Click **Add** to add the selected pack size as a lower level of the higher pack size.
 - Click **Remove** to remove the selected pack size from a higher level pack size,

Note: The **Add** button is not available when:

- There is already a smaller pack size assigned at a lower level
 - No smaller pack size exists where the larger pack is a multiple of the smaller pack
-
-

6. Click **Save** to update any changes made to the SKU Pack Sizes list.

Pack Breaking by Warehouses

Navigate: Log into Data Management. From the Warehouse menu, select Core Data, and then select the Pack Breaking tab.

See [Figure 5–8, "Pack Breaking Tab"](#)

1. Select the **Warehouses** option.
2. Enter criteria to retrieve break packs by warehouse:
 - Warehouse: Enter a warehouse, or click the LOV button and select a warehouse.
 - Class: Enter the Class ID, or click the LOV button and select a class. This selection is filtered based on the warehouse selection.
 - SKU: Enter the SKU ID, or click the LOV button and select a SKU. This selection is filtered based on the warehouse and class selections.

Note: At least one Warehouse and a Class must be selected for **Search** to be available.

3. Click **Search** to populate the Warehouses/SKU/Break Pack grid.

Note: Data Management displays each warehouse/SKU combination where the SKU is profile ranged, exception ranged, or pending de-ranged at the warehouse.

The Break Packs check box is selected for any warehouse/SKU combination that is currently saved.

4. The Break Packs check box is selected for any warehouse/SKU combination that is currently saved. Update the Break Packs check boxes using these buttons:
 - Check All: Selects all Break Packs check boxes in the grid.
 - Uncheck All: Clears all Break Packs check boxes in the grid.
 - Reset All: Sets all Break Packs check boxes in the grid to the value stored in the database.
5. Click **Save** to update the changes or click **Clear** to reset the grid.

Define Warehouse Defaults and Exceptions

This section provides information on:

- [Define Warehouse Defaults](#)

- [Define Warehouse Exceptions](#)
- [Warehouse Receipt Availability](#)

Define Warehouse Defaults

This section provides information on how to:

- [Maintain Coupled Indicators for a Warehouse](#)
- [Maintain Size and Volume Properties for a Location](#)

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 5–9 Warehouse Coupled Flag Tab

Data Management Online - Warehouse - Warehouse Data - Warehouse Product Defaults & Exceptions

Warehouse Store General

Warehouse Product Defaults & Exceptions

Warehouse Receipt Availability Pack Breaking **Warehouse Coupled Flag** Stockless Indicator Exceptions Pallet and Order Multiples

Effective Date 10/7/2016

* Warehouse Chamber [LOV] [None]

Class [LOV] [None]

SKU [LOV] [None]

Available SKUs	Coupled

Check All Uncheck All Reset All

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

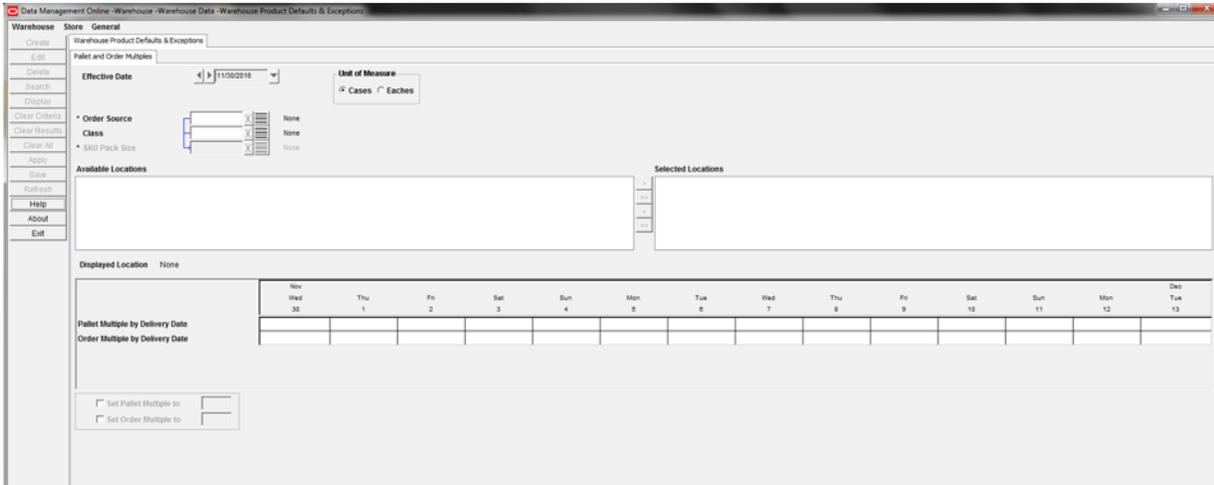
Maintain Size and Volume Properties for a Location

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

Search for Locations

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

Figure 5–10 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.

Figure 5–11 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, SKU 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.
 - **SKU:** SKU is required when maintaining exceptions by SKU. Enter the SKU ID, or click the LOV button and select a SKU.
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 SKUs 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 SKU or warehouse.

- **No Exception:** No exception exists for the SKU/warehouse from the selected effective date onwards.
- **Stocked:** An exception is present for the SKU/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 SKU/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**.

Warehouse Receipt Availability

Warehouse receipt availability defines the ability of a receipt on a day to meet the demand of a particular destination.

When the destination's shipment leaves after the receipt is available, then the receipt is available.

When the destination's shipment leaves before the receipt is available on that day, then the receipt is unavailable.

The shipment must be met by a warehouse receipt on an earlier date.

Use Warehouse Receipt Availability to help facilitate warehouses in receiving Intra-day deliveries. You can indicate whether shipments to a specific location ship out of the warehouse before or after a receipt into the warehouse on that day.

Navigate: Log into Data Management. From the Warehouse menu, select Warehouse Data and then the Warehouse Receipt Availability tab.

The Warehouse Receipt Availability tab includes these two tabs:

- [Department/Warehouse Tab](#)
- [SKU/Warehouse Tab](#)

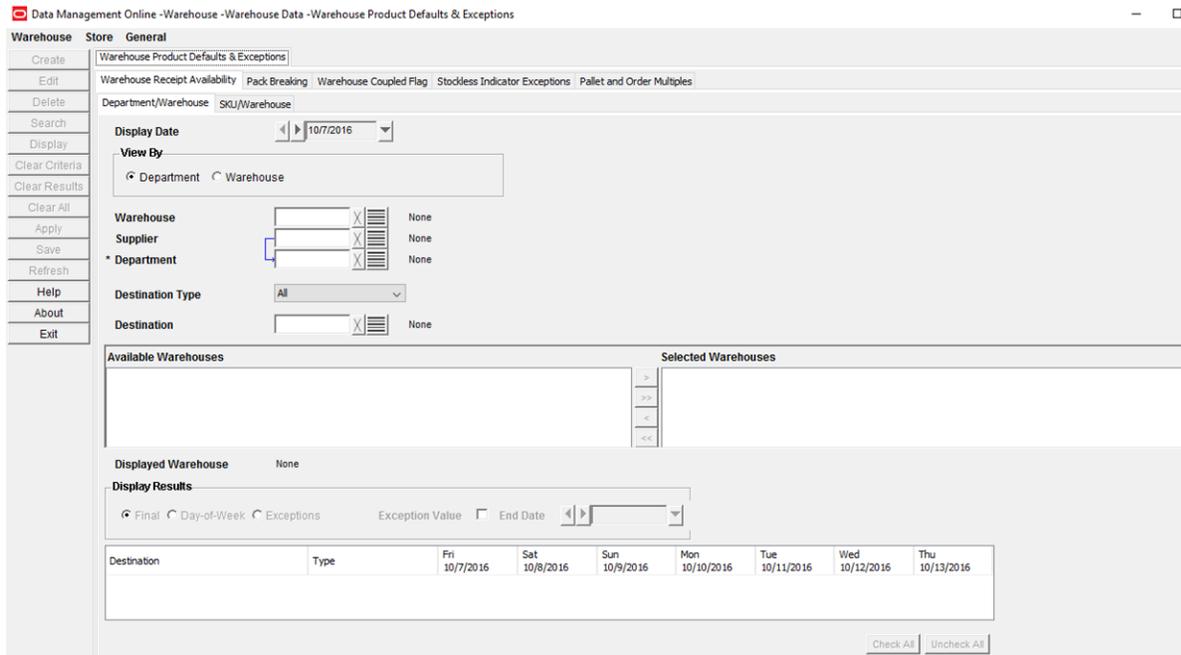
Department/Warehouse Tab

The Department/Warehouse tab allows you to view and maintain the Warehouse Receipt Availability at the warehouse/department/DOW or dated exception level.

On the Department/Warehouse tab, you can:

- [View and Manage Department/Warehouse Level Available-for-picking Destinations](#)
- [Update Available-for-picking Destinations and Exceptions](#)

Figure 5–12 Warehouse Receipt Availability: Department/Warehouse Tab



View and Manage Department/Warehouse Level Available-for-picking Destinations

1. Use the Effective Date drop-down menu to select an Effective Date.
2. Select either the Department or Warehouse option to view the Warehouse Receipt Availability's Available to Pick Locations.

Note: Selecting **Department** requires mandatory input to the Department LOV and optional input to the Warehouse LOV. Selecting **Warehouse** requires mandatory input to the Warehouse LOV and optional input to the Department LOV.

3. Select your search criteria as described in the following table:

Criteria	Description
Warehouse	Contains all warehouses in the system. Required when the Warehouse option is selected.
Supplier	Contains all suppliers in the system.
Department	Contains all departments in the system for your permissions. Required when the Department option is selected.
Destination Type	Use the drop-down menu to select either All, All Warehouse, All Stores, or a specific store.
Destination	Contains all warehouses and all stores filtered by your Destination Type selection.

4. Click **Search**. The Department/Location tab lists all of your Department or Warehouse search results in the selector and populates the Destination table and displays results up to seven days from the selected Display Date.

- a. To view the results for a single destination, click to select one destination in the selector and then click **Display**. The Destination table lists the results for that destination.

Note: In the Destination table, a destination is available for dates listed as True.

Update Available-for-picking Destinations and Exceptions

Use the Destination table to:

- Change Available-for-picking destinations
 - Create exceptions for one or more dates and one or more departments
 - Delete exceptions for one or more dates and one or more departments
1. Find Available-for-picking Destinations using [View and Manage Department/Warehouse Level Available-for-picking Destinations](#)
 - Click the Destination, Destination Type, or Apply Exception column headings to re-sort the Destination table.
 - Click **Check All** to select all rows in the Destination table. Click **Uncheck All** to clear all rows in the Destination table.
 2. In the Destination table, select a Display Results option to display either the **Final**, **Day-of-Week**, or **Exceptions** for the Department or Warehouse results.

Display Results Option	Description
Final	Displays day-of-week results for dates with no exceptions. If an exception exists for a date it displays in the column and has a red background. An exception overrides all defaults on a given day.
Day-of-Week	Displays only day-of-week results and no exceptions.
Exceptions	The Apply Exception and Remove Exception columns are available. The column is checked when an exception is defined for the displayed Department/warehouse and destination on any displayed date. These columns are mutually exclusive. Selecting one column clears the check box of the other column in the same row.

3. Enter any changes in the Destination table and click **Save**.

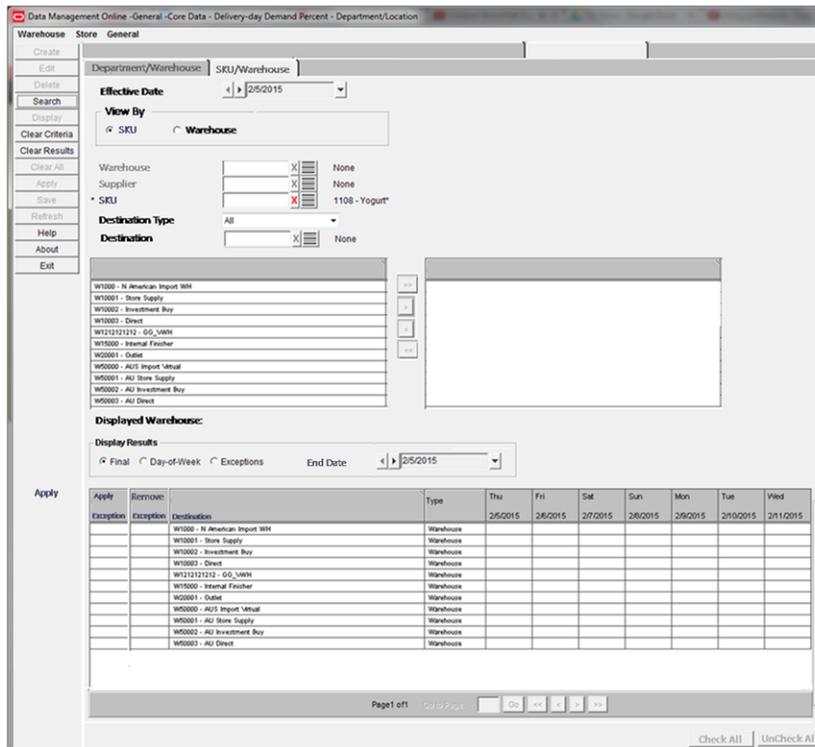
SKU/Warehouse Tab

The SKU/Warehouse tab allows you view and maintain the Warehouse Receipt Availability at the warehouse/SKU/DOW or dated exception level.

On the SKU/Warehouse tab, you can:

- [View and Manage SKU/Warehouse Level Available-for-picking Destinations](#)
- [Update Available-for-picking Destinations and Exceptions](#)

Figure 5–13 Warehouse Receipt Availability: SKU/Warehouse Tab



View and Manage SKU/Warehouse Level Available-for-picking Destinations

1. Use the Effective Date drop-down menu to select an Effective Date.
2. Select either the SKU or Warehouse option to view the Warehouse Receipt Availability's Available to Pick Locations.

Note: Selecting **SKU** requires mandatory input to the SKU LOV and optional input to the Warehouse LOV. Selecting **Warehouse** requires mandatory input to the Warehouse LOV and optional input to the SKU LOV.

3. Select your search criteria as described in the following table:

Criteria	Description
Warehouse	Contains all warehouses in the system. Required when the Warehouse option is selected.
Supplier	Contains all suppliers in the system.
SKU	Contains all SKUs in the system for your permissions. Required when the SKU option is selected.
Destination Type	Use the drop-down menu to select either All, All Warehouse, All Stores, or a specific store.
Destination	Contains all warehouses and all stores filtered by your Destination Type selection.

4. Click **Search**. The SKU/Location tab lists all of your SKU or Warehouse search results in the selector and populates the Destination table and displays results up to seven days from the selected Display Date.
 - a. To view the results for a single destination, click to select one destination in the selector and then click **Display**. The Destination table lists the results for that destination.

Note: In the Destination table, a destination is available for dates listed as True.

Update Available-for-picking Destinations and Exceptions

Use the Destination table to:

- Change Available-for-picking destinations
 - Create exceptions for one or more dates and one or more SKUs
 - Delete exceptions for one or more dates and one or more SKUs
1. Find Available-for-picking Destinations using [View and Manage Department/Warehouse Level Available-for-picking Destinations](#)
 - Click the Destination, Destination Type, or Apply Exception column headings to re-sort the Destination table.
 - Click **Check All** to select all rows in the Destination table. Click **Uncheck All** to clear all rows in the Destination table.
 2. In the Destination table, select a Display Results option to display either the **Final**, **Day-of-Week**, or **Exceptions** for the SKU or Warehouse results.

Display Results Option	Description
Final	Displays day-of-week results for dates with no exceptions. If an exception exists for a date it displays in the column and has a red background. An exception overrides all defaults on a given day.
Day-of-Week	Displays only day-of-week results and no exceptions.
Exceptions	The Apply Exception and Remove Exception columns are available. The column is checked when an exception is defined for the displayed SKU/Warehouse and destination on any displayed date. These columns are mutually exclusive. Selecting one column clears the check box of the other column in the same row.

3. Enter any changes in the Destination table and click **Save**.

Create Warehouse Ordering Parameters

This section provides information on:

- [Order Groups](#)
- [Supplier Locks](#)
- [Define Non-Order/Non-Delivery Days](#)
- [Maintain Order Cycles](#)
- [Selecting 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

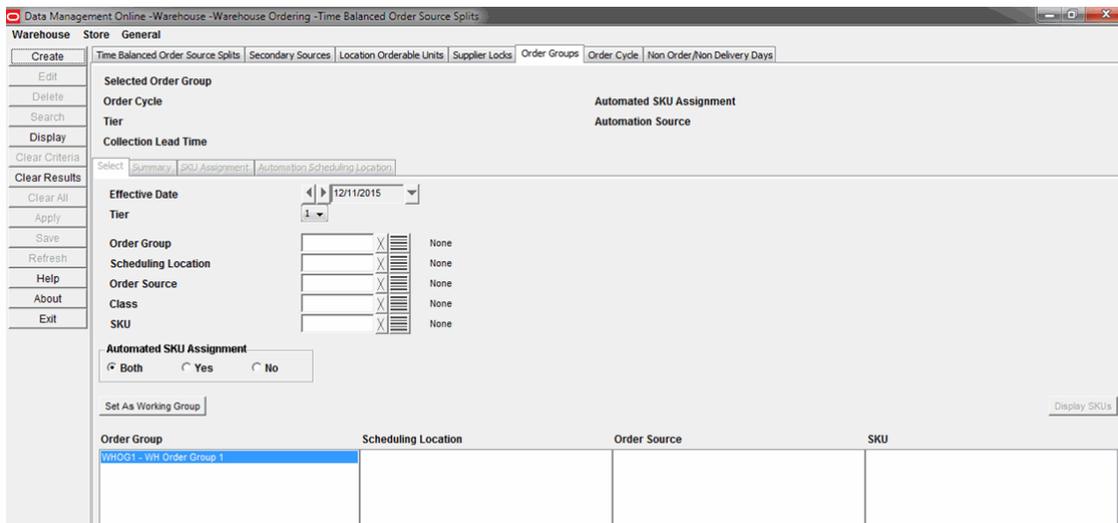
Order groups are used to group source SKUs together to enable more efficient maintenance of ordering lead times within the supply chain. Order groups are only used at the chamber level. They are not used for store ordering. By using order groups, you can put all the source SKUs that have the same ordering behavior into one group for maintenance. An order group is assigned to a single order cycle. All source/SKU/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 SKU 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 SKUs 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 5–14 Order Groups Tab



1. Click **Create**. The [Create Order Group Window](#) opens.

Figure 5–15 Create Order Group Window

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 SKU Assignment checkbox to indicate the system should automatically create SKU 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 SKU.

- a. Select the Automated SKU 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 SKUs 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, SKUs, and Automation Scheduling Locations tabs.

Tab	Description
Summary	The Summary tab allows you to view sources, SKUs, 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.
SKU	The SKUs 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 SKU 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 SKU 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/SKU/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 5–16 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.
SKU	Enter the SKU ID, or click the LOV button and select a SKU.
Automation SKU	<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 SKU assignments enabled or unavailable. ■ Yes: Returns only matching search results which are assigned to an order group with automated SKU assignment enabled. ■ No: Returns only matching search results which are assigned to an order group with automated SKU assignment unavailable.

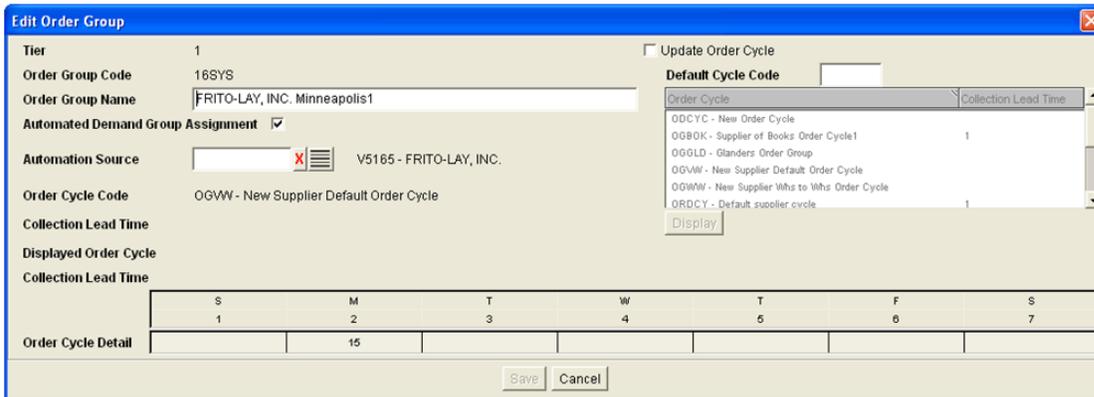
3. Click **Search**.
4. In the Order Group column, select the order group you want to edit or view.
5. Click **Set As Working Group**.

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 5–17 Edit Order Group Window



3. In the Order Group Name field, enter the new name.
4. De-select the Automated SKU assignment option if you want to remove the Automated SKU 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 SKU 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 5–18 Summary Tab

3. In the Effective Date field, select the date you want to view a summary for.
4. Limit the data as necessary:

- Select a supplier to limit the list of scheduling locations.

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

- 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 SKUs that are assigned.

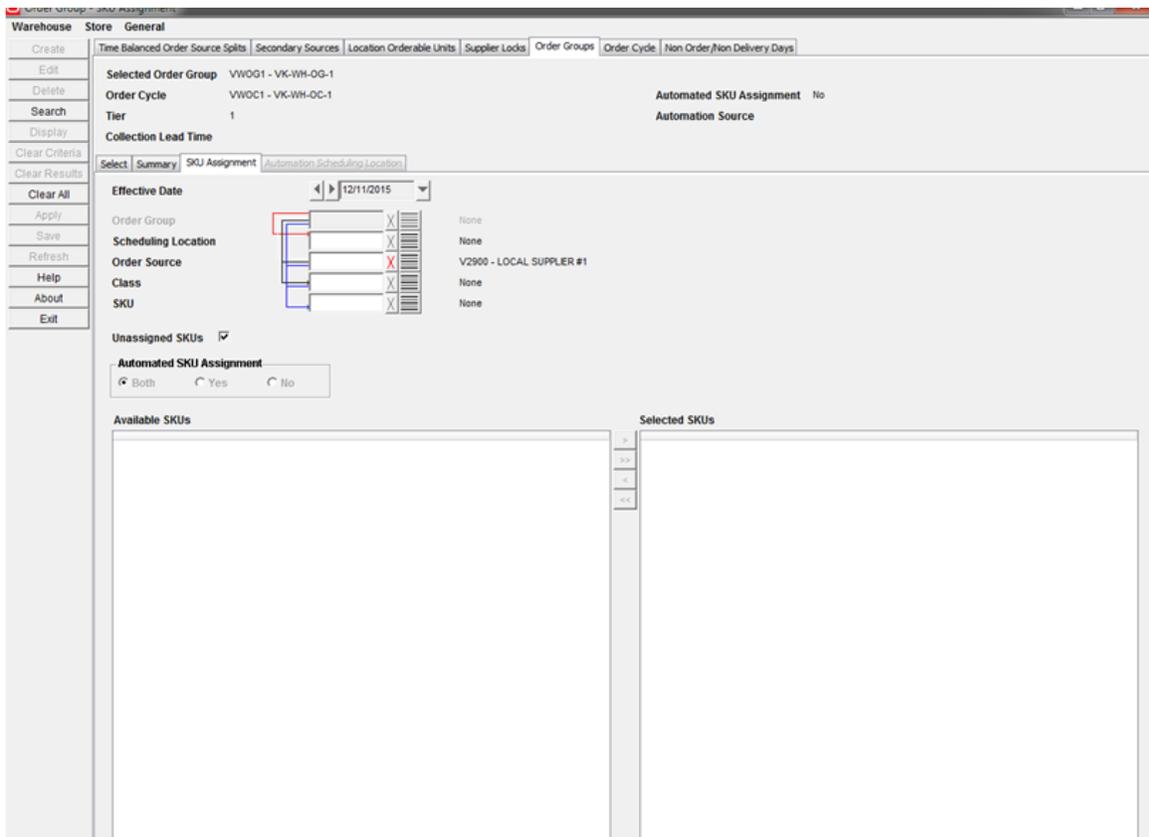
5. Click **SKUs** to display a list of SKUs limited by selections in the Supplier and Scheduling Location lists.

Assign a SKU 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 SKU Assignment tab.

Figure 5–19 SKU Assignment Tab



3. In the Effective Date field, select the date you want to view a summary for.
4. Enter additional criteria to retrieve a SKUs.

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 SKU option is not selected.
Scheduling Location	Enter the scheduling location ID, or click the LOV button and select a scheduling location.
Order Source	Enter the order source ID, or click the LOV button and select an order source. When using the LOV button, the window displays all suppliers and warehouses, which have at least one chamber that is NOT assigned a status of New or Closed .
Class	Enter the class ID, or click the LOV button and select a class. Entering a class filters SKUs based on the specified class.
SKU	Enter the SKU ID or click the LOV button and select a SKU. Entering a SKU limits your search to valid order sources and scheduling locations for the specified SKU.
Unassigned SKUs	Select the Unassigned SKUs check box to return SKUs that are not assigned to an order group. Clear the checkbox to return SKU that are assigned to an order group on the specified effective date.

Criteria	Description
Automated SKU Assignment	<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 SKU assignments enabled or unavailable. ■ Yes: Returns only matching search results which are assigned to an order group with automated SKU assignment enabled. ■ No: Returns only matching search results which are assigned to an order group with automated SKU assignment unavailable.

5. Click **Search**.
6. Move the SKUs from the Available SKUs to the Selected SKUs area.

Note: SKUs are in subfolders for each supplier. Double-click a supplier folder to view the SKUs.

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

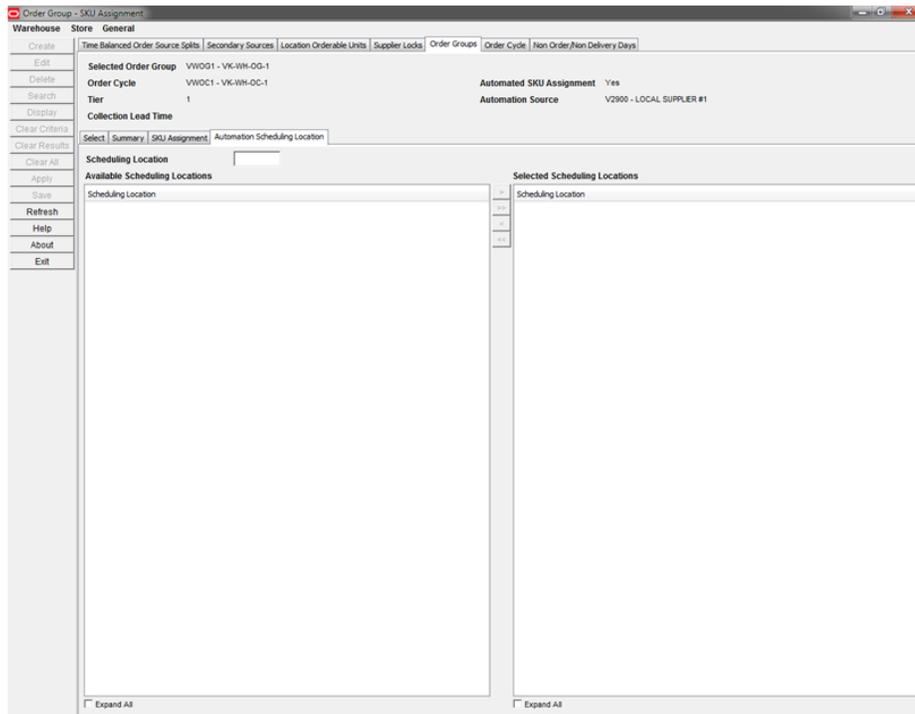
Assign the Automation Scheduling Location to an Order Group

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 5–20 Automation Scheduling Location Tab



Note: The Automation Scheduling Location tab is only enabled for Order Groups with Automated SKU 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 informational only. It does not constrain the receipt plan. Typically a Supplier Purchase Quantity (SPQ) is entered once the week locked (once the quantity is committed to the supplier).

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.

Level	Description
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 5–21 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 5–22 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**.

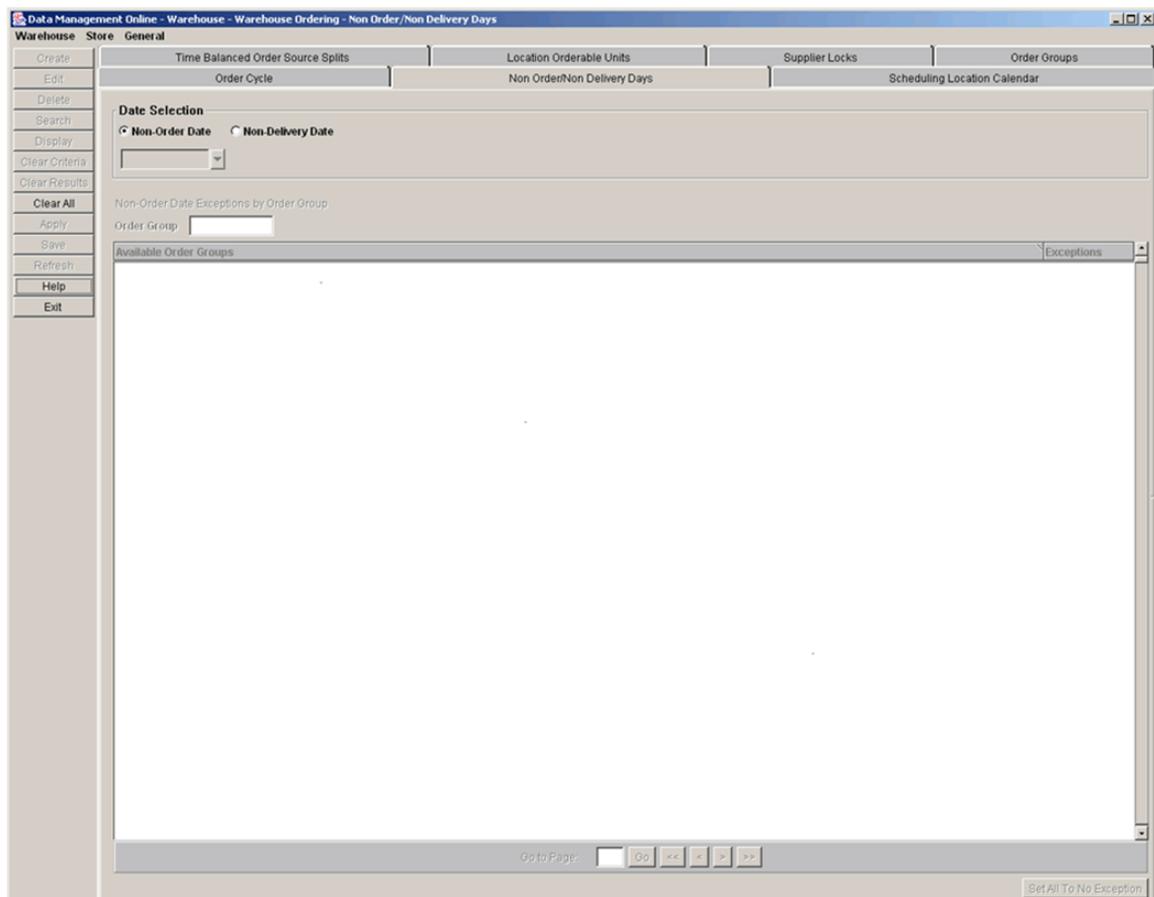
Define Non-Order/Non-Delivery Days

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 5–23 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.

To...	Then...
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 5-24 Order Cycle Tab

The screenshot shows the 'Order Cycle' tab in the Data Management Online interface. The window title is 'Data Management Online - Warehouse - Warehouse Ordering - Order Cycle'. The interface includes a menu bar with 'Warehouse', 'Store', and 'General'. Below the menu bar are several tabs: 'Time Balanced Order Source Splits', 'Location Orderable Units', 'Supplier Locks', and 'Order Groups'. The 'Order Cycle' tab is active, showing a 'Select Order Cycle' field with a search box. A list of order cycles is displayed, with 'E3028 - Order Cycle 28x24' selected. Below the list, the 'Order Cycle Length' is 28 and the 'Collection Lead Time' is 24. A calendar grid shows the order cycle days from 1 to 28.

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 5–25 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**.

Selecting 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/SKU/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 5–26 Location Orderable Units Tab

The screenshot displays the 'Location Orderable Units' tab in the Data Management Online interface. The interface includes a search form with the following fields and options:

- Effective Date:** A date picker set to 10/2/2014.
- * Tier:** A dropdown menu set to 1.
- * Order Source:** A list of three items, each with a checkbox and a 'None' option.
- * Class:** A list of three items, each with a checkbox and a 'None' option.
- * SKU:** A list of three items, each with a checkbox and a 'None' option.

Below the search form are two tables:

- Available Locations:** A table with columns for 'Locations' and 'Orderable Units'.
- Selected Locations:** A table with columns for 'Locations' and 'Orderable Units'.

At the bottom of the interface, there is a 'Displayed Location' section showing 'None' and a 'Set Orderable Units' field.

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.
SKU	Enter the SKU ID, or click the LOV button and select a SKU.

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.

Note: Pack Change Events cannot be overridden in this window. Stores should be added to the excluded destinations list to manually change a pack size that is part of an Event.

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 SKUs 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 5–27 Time Balanced Order Source Splits Tab

1. In the Effective Date field, select the date the split begins.
2. In the SKU field, enter the SKU ID that the split applies to, or click the LOV button and select a SKU.
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 SKU 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, SKU, and warehouse. The **Reset Order History** button allows you to clear the order history for the SKU at the selected warehouses. The history is cleared for all sources of the SKU 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 SKU field, enter the SKU ID of the history to be cleared, or click the LOV button and select a SKU.
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 SKU/Destination warehouse. This list is used whenever a shortage is experienced for a SKU-pack within the SKU 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 SKU/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 5–28 Secondary Sources Tab

1. In the SKU field, enter the SKU ID to which the secondary source applies, or click the LOV button and select a SKU.
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 SKU /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 SKU/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 SKU/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 SKU/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**.

Scheduling Calculations

This chapter provides information about the Data Management (DM) scheduling calculations including:

- [Release Schedule Calculations](#)
- [Final Schedule Calculation](#)
- [Pack Change Event](#)

Release Schedule Calculations

About the Release Schedule

The release schedule (also referred to as the lead time schedule) is the resulting output of processes that combine all of the attributes that define a supply chain including:

- Receiving calendars
- Lead time cycles
- A number of ordering and delivery exceptions
- Sourcing
- Ranging

For each product, the schedule will be a series of lead times between source and destination on each day in the planning horizon that is able to receive.

This process describes how to put together the final primary lead time and alternate lead time schedule for all product/locations. The resulting schedule represents all delivery opportunities and their lead-times.

About the Release Schedule Calculation Process

The attributes that define a supply chain differ for warehouse destinations and store destinations. Therefore the process for stores is different than warehouses. Two different schedules may be output for a warehouse destination, one for primary sourcing and one for alternate sourcing. Additionally, destinations that receive cross-docked products require a different method of calculating the schedule.

The release schedule calculation includes:

- [Store Schedule Calculation](#)
- [Warehouse Primary-source and Alternate-source Schedule Calculation](#)
- [Store and Warehouse Cross-dock Schedule Calculation](#)

- [Final Primary Schedule Calculation](#)

Store Schedule Calculation

The DM system allows you to set and manipulate the parameters for the store release schedule. The store release schedule must be calculated for each valid SKU/Store/day combination. This schedule is calculated real-time in the DM Store Schedule window and in the nightly batch.

The store schedule is calculated across the planning horizon for all non-cross-docked routes. This is logically defined for a SKU/Store/Day.

Calculation - Store Release Schedule

The store release schedule must be calculated for each valid SKU/Store/day combination. A SKU/Store/day combination is valid when the SKU is on-supply at the store on the day being processed, and the day is within the planning horizon defined for the SKU at Stores. The schedule is also calculated outside of the on-supply period to allow for User Specified Allocations (USAs).

Determining the Day-of-Cycle for Order Cycles

This section describes the cycle day for all default and exception order cycles including:

- [Pattern Length](#)
- [Day-of-Cycle](#)

Pattern Length

Every order cycle has a pattern length. For instance, the valid pattern lengths for creating an order cycle are:

- Week—7 days
- Fortnight—14 days
- Four-Week—28 days

Day-of-Cycle

To determine the Day-of-Cycle, first determine the order cycle's pattern length. Next subtract the system wide cycle start date from the current date being processed. Finally, mod the resulting difference with the cycle length and add one (1) to get the day-of-cycle.

Determining the Store Schedules

Perform the following actions to determine the store schedules:

- Check the Corporate Non-Receipt Day and the Store Receiving Calendar. Any day that is a Corporate Non-receipt day or which is not a receiving day will not have a lead time in the release schedule.
- Retrieve the single profile and the default order cycle based on the store source value.
- Retrieve the day-of-cycle release lead time defined for the default order cycle. The default lead time will be overwritten by all exceptions.
- Determine if the following exception exists, and apply all the existing exceptions:

- Profile Release Exception
- SKU Order Cycle exception
- Store/Profile Order Cycle Exception
- SKU/Store Order Cycle exception
- SKU/Store Release Exception
- If a non-N/A lead time exists for the SKU/Store/Day, determine the release date by subtracting the lead time from the current day/date.
- If the release date falls on a Corporate Non-Release Date apply the Non-Release Date and Non-Release Date Exceptions to the release schedule:
 - If Non-Release Date Exception exists for the release date, then a valid lead time has been determined.
 - If no exception exists, increase the lead time by one and validate the new release date.
- At no point may the release date fall before Today.
- The resultant release lead time has been determined for the SKU/Store/Day. A valid lead time will be saved to the SKU/Store release schedule.

Warehouse Primary-source and Alternate-source Schedule Calculation

Warehouses can have primary and alternate sources. The DM system allows you to setup and manipulate the parameters for the warehouse release schedule. The warehouse release schedule defines the lead time for each day in the schedule as well as the valid receiving days.

For each day in the planning horizon, the default order cycle and other parameters are combined to produce two release schedules. They are the primary source schedule and the alternate source schedule, both of which are at the Source/SKU-pack size/Warehouse/Date combination.

Warehouse Primary-source Schedule

The warehouse primary-source schedule is calculated across the planning horizon for all non-cross-docked routes from primary sources. This is logically defined for a source/SKU/Pack-size/Warehouse/Day.

The primary source schedule is the schedule that should be used in replenishment to determine on what days an order can be placed on a specific source for delivery into a specified destination. This schedule is calculated real-time in the DM Warehouse From Source Schedule window, and in the nightly batch.

Warehouse Alternate-source Schedule

When the Warehouse has alternate sources the warehouse alternate-source schedule is calculated across the planning horizon for all non-cross-docked routes from alternate sources. This is logically defined for a source/SKU/Pack-size/Warehouse/Day.

The alternate source schedule is only used by Reconciliation as a result of the need to get inventory into a destination from a source that was not planned by Replenishment. This schedule is also calculated real-time in DM and is calculated in the nightly batch.

Calculation - Warehouse Release Schedule

The process for determining the warehouse release schedule includes:

- [Determining the Day-of-Cycle for Order Cycles](#)
- [Determining the Primary and Alternate Source Schedules](#)

Determining the Primary and Alternate Source Schedules

Perform the following actions to determine the primary and alternate source schedules:

- Loop over the Order Group Assignments to get possible Source/SKU/Warehouse-chamber/day combinations requiring a release schedule. The process will ensure that the source is still a valid supplier or ranged warehouse.
- Determine if a valid warehouse orderable unit (SKU-pack size) is defined.
- Check the Warehouse Receiving Calendar. Any day that is not a receiving day will not have a lead time in the release schedule.
- Also Check the Corporate non-delivery date and exceptions to determine if the day is valid to receive.
- Get the order cycle assigned to the current assignment's order group. Then get the appropriate day-of-cycle lead time for the order cycle. If the lead time is an N/A value, the current date is not valid for deliveries.
- Subtract the lead time from the current day to get the order release date. Check the Corporate Non-order Date and exceptions to determine if the day is valid to order.
- If the resulting order release date is before the current batch run date (TODAY), no deliveries can be received on the current day.
- If a source is a primary source and/or alternate source for a SKU-packsizes/Warehouse day combination, then the lead time for that day should be written out to the appropriate schedule. A positive, non-zero Time-balanced Order Source Split value identifies a primary source. The lead time should be applied to the primary schedule. If the source is a alternate source the lead time should be applied to the alternate schedule.

Store and Warehouse Cross-dock Schedule Calculation

Where a store or warehouse is the final receiving destination of cross-docked products a cross-dock schedule is calculated. Store cross-dock schedules are logically defined for a SKU/Store/Day. Warehouse cross-dock schedules are logically defined for a source/SKU/Pack-size/Warehouse/Day.

Within AIP, the term cross-docked describes the movement of a discrete quantity of inventory between an original source and a final destination through one or more intermediate locations.

Cross-docking is set up in a dedicated screen which requires the user to specify the exact path the inventory must take when being moved from original source to final destination.

Calculation - Cross-dock

The cross-dock calculation takes the individual node to node lead times, processing and max hold times and puts them together to get a single original source to final destination schedule.

This process has three steps:

1. [Initial Checks](#)

- 2. [Calculating Node to Node Schedules](#)
- 3. [Calculating the Cross-dock Schedule](#)

Initial Checks

Initial Checks is performed to see if it is appropriate to calculate a cross-dock schedule for the day in the planning horizon. The initial checks include two parts:

- 1. To pass the first check, the DM repository should indicate that orders between the source and destination for the SKU on the given date are cross-docked.
- 2. Perform the checks according to the final destination type.

If the final destination is a...	Then...
Store	<ul style="list-style-type: none"> ■ Validate the delivery date falls within the supply dates at the store. A period of time outside of the supply dates is also used to allow for User Specified Allocations (USAs) ■ Ensure the Store Source is the originating cross-dock source ■ Ensure the orderable pack is defined and is not discontinued on or before the delivery date.
Warehouse	<ul style="list-style-type: none"> ■ Ensure the warehouse source either a primary or alternate is the originating cross-dock source ■ Validate the Warehouse Orderable Unit is defined, has a ranged or pending deranged status, is not discontinued on or before the delivery date

If any check fails, then it is indicated that there is no delivery opportunity for the originating-source/SKU/final-destination on the given delivery-date

Calculating Node to Node Schedules

Cross-dock movements are made up of multiple node to node component movements. The second step of the broader process involves working out a schedule for each node to node movement that considers all additional DM-related data such as calendars, corporate delivery and receiving exceptions, sourcing and ranging data

For each node to node movement the following criteria must be met:

- The day of week default value from the order cycle identified by the user for the date indicates deliveries are possible on the date in question (there is a valid lead time greater than or equal to zero days).
- The lead-time on the date indicates the release date is on or after Today.
- The location specific calendar and its exceptions indicate that the location is open to receive on the date.
- The corporate non-delivery (to warehouse) or non-receipt date (to store) don't rule out the day as being one on which a delivery cannot take place. Note that exceptions are not considered due to the lack of Order Groups and Profiles for cross-docked locations.
- The delivery date is before the Stop Receiving Date of the SKU into the warehouse.

If the delivery date meets all of the previously listed criteria, determine if its release date falls on a non-order date (valid only for warehouses) or a non-release date (valid only for stores).

If a non-order date is encountered then the delivery date can no longer be considered valid.

If a non-release dates is encountered, then the lead-time for delivery date must be incrementally increased one day at a time until it no longer falls on a non-release date.

If by increasing the lead time, the newly determined release date of the delivery falls before Today, then the delivery date can no longer be considered valid.

If the delivery date is considered valid, the resulting lead-time is written to the node to node schedule for that date.

Calculating the Cross-dock Schedule

The third step of the process is to determine the final cross-dock schedule. This schedule is calculated by putting the calculated node to node movements schedule together in combination with processing and holds times.

As a starting point, this process uses the schedule for the final node to node movement in the chain that was determined in the previous step. For each valid delivery opportunity in the final node to node schedule, the process must attempt to find valid delivery opportunities in the schedules of all the upstream movements. When searching upstream for delivery opportunities that can serve downstream movements, the downstream movement must fall no earlier than the (upstream delivery date plus processing time) and no later than the (upstream delivery date plus processing time plus max hold time).

For a valid delivery opportunity at the final destination, if a set up upstream movements can be identified that serve the final destination on the specific date, then the release date of the originating movement from the original source is used, along with the delivery date into the final destination to calculate a lead time. That lead time then indicates the total time it takes to validly move inventory from original source to final destination on the date in question in the final cross-dock schedule. Otherwise, that delivery opportunity into the final destination should be considered a non-delivery date and the final cross-dock schedule between original source and final destination should indicate it as so.

Final Schedule Calculation

This section describes these schedule calculations:

- **Final Primary Schedule Calculation**
- **Final Alternate Schedule Calculation**

The Final Schedule calculations include these process inputs:

Process Inputs	Description
Store Schedule	The store schedule is calculated across the planning horizon for all non-cross-docked routes.
Warehouse Primary-source Schedule	Warehouses can have primary and alternate sources. The warehouse primary-source schedule is calculated across the planning horizon for all non-cross-docked routes from primary sources.
Warehouse Alternate-source Schedule	When the Warehouse has alternate sources the warehouse alternate-source schedule is calculated across the planning horizon for all non-cross-docked routes from alternate sources.

Process Inputs	Description
Store and Warehouse Cross-dock Schedules	Where a store or warehouse is the final receiving destination of cross-docked products a cross-dock schedule is calculated.
Alternates as Primary Indicator	The Alternates as Primaries indicator is a user specified setting that indicates whether or not Alternate Source lead times can be used to plan deliveries inside of the primary sources' lead times. When allowed, a lead time must be written to the primary schedule.

Final Primary Schedule Calculation

The calculation takes the individual non-cross-dock and cross-dock schedules and puts them together into a single schedule by destination type. For warehouse destinations the Alternates as Primaries indicator is then used to add additional lead times to the final primary schedule.

This process performs these functions:

- [Calculating a Final Schedule for Stores](#)
- [Calculating a Final Primary Schedule for Warehouses](#)
- [Apply Alternates as Primary Lead Times to Warehouse Schedules](#)

Calculating a Final Schedule for Stores

Because a store can only have a single source of a SKU per day the store schedule is not source specific and there is only a single possible lead time per day. As a result this process can simply overlay the SKU/store/day cross-dock schedule on top of the standard non-cross-docked schedule for the period of time where the store is the final receiving destination of a cross-dock and the store source matches the originating source of a cross-dock.

Calculating a Final Primary Schedule for Warehouses

A warehouse can have multiple primary sources per SKU/pack-size/day. A schedule is output for each primary source. The warehouse cross-dock schedule is overlaid on top of the standard non-cross-dock schedule for the period of time where the warehouse is the final receiving destination of a cross-dock and the sources with a positive, non-zero source split percent matches the originating source of a cross-dock.

Where a warehouse is an intermediate node of a cross-dock route, the non-cross-dock schedule is output to the final schedule so that the warehouse may serve other destinations which are not part of a cross-dock route.

Apply Alternates as Primary Lead Times to Warehouse Schedules

The Alternates as Primaries indicator is a user specified setting that indicates whether or not Alternate Source lead times can be used to plan deliveries inside of the primary sources' lead times. When allowed, a lead time must be written to the primary schedule.

This indicator is a scalar measure with three settings. The default value is None and this indicates that none of the processing discussed in this section should be performed. When it has any other value, the additional logic described in this section should be performed.

The aim of this additional logic is, from a business perspective, to leverage the ability of a warehouse's alternate source to deliver on a shorter lead time than any of the legitimate Primary sources. If there is an alternate source who can deliver earlier than

the earliest Primary, then either the earliest or all of those delivery opportunities (depending upon the indicator) that are earlier than the earliest Primary delivery opportunity should be written out to the Primary Schedule of that Alternate Source. In effect, that Alternate Source becomes the Primary Source for the time period between the beginning of the Planning Horizon and the point at which the real Primary Sources can first deliver.

While there could be more than one Alternate Source that legitimately has a delivery opportunity before the first Primary Delivery, only the highest priority Alternate Source with a delivery opportunity before the first Primary Delivery is processed. Alternate Sources are accessed in priority order until one that meets the delivery opportunity criteria. The priority of the Alternate Sources is determined by a process called *Pre-processing Alternate Source List* which is documented in a separate functional spec. Once the selected Alternate Source has been processed, the processing for the current SKU-pack/Destination stops.

If there are no Alternate Sources with a delivery opportunity earlier than the earliest Primary Delivery, then the additional processing ceases having made no changes to any schedules.

The Alternates as Primaries indicator has two values that dictate whether just the earliest delivery opportunity or all delivery opportunities earlier than the earliest Primary Delivery should be written to the Alternate's Primary Schedule. The rationale for wanting to select just the earliest alternate delivery opportunity is that a retailer may prefer to plan a single delivery from the alternate source to cover the period of time before the first Primary Source's delivery rather than many.

Final Alternate Schedule Calculation

This process performs this function:

- [Final Alternate Schedule Calculation for Warehouses](#)

Final Alternate Schedule Calculation for Warehouses

The calculation takes the individual alternate non-cross-dock and alternate cross-dock schedules and puts them together into a single alternate schedule.

The warehouse alternate cross-dock schedule is overlaid on top of the alternate non-cross-dock schedule for the period of time where the warehouse is the final receiving destination of a cross-dock and the sources identified as alternate sources match the originating source of a cross-dock.

Where a warehouse is an intermediate node of a cross-dock route (not a final destination) the non-cross-dock alternate schedule is output to the final alternate schedule so that the warehouse may serve other destinations which are not part of a cross-dock route.

Pack Change Event

A pack change event identifies the order point where a source provides a new pack to the supply chain instead of the old pack. The event is created to trigger the automated maintenance of Data Management data that is tedious to manually change.

You can create a pack change event for one or more sources and one pack. Identify the sources highest in the supply chain where the pack change starts and not all of its affected sources. Typically this is a supplier or a set of warehouses that break packs for its destinations.

A pack change event may be permanent or temporary.

A permanent pack change:

- Has no end date and does not revert back to the previous pack
- May be changed to a temporary pack change (end dated)

A temporary pack change:

- Has an end date at which point the locations revert back to ordering the previous pack
- May be changed to a permanent pack change (no end date)

A pack change event may also have warehouse and store destination exclusions. The exclusions need only be the destinations highest in the supply chain where the pack change should not be applied.

Process

This process describes how to navigate the supply chain of a SKU pack from a source to all destinations which are not excluded from the event.

The process is the same regardless of what action is being performed, for example, an initial spread, an update of a date, or canceling the event, and so on. The process begins by undoing all pack changes created as a result of the event. This is done to ensure that no gaps are created in the timeline, particularly where dates are being modified.

The process then uses raw cycle lead times (without various exceptions and receiving calendars applied) to identify all source/destination combinations and the first delivery opportunity where the pack (either the new or reverted pack) can pass through the appropriate nodes of the supply chain to reach that destination.

Applying the Pack Change

Output

Applying a pack change creates an override of the preferred Orderable Unit (OU) for all SKU/locations downstream of the initiating sources which order the changing pack at the determined start of the pack change.

When the pack change is temporary the process affects two sets of changes to the OU:

- From the original pack to the temporary pack
- From the earliest time the original pack can be re-introduced into the supply chain

Inputs

When applying a pack change, Pack Change Events are the primary input which have the following attributes associated with them.

Attribute	Description
Change-from pack	The initial ordering pack that will be changed either permanently or temporarily.
Change-to pack	The new pack that will be ordered either permanently or temporarily.
Sources	The list of the suppliers , warehouses, or both at the highest level of the supply chain where the change takes place.

Attribute	Description
First Order Date	The first date that the Change-to pack can be ordered from the sources.
Last Order Date	The last date that the change-to pack can be ordered from the sources. This field can be blank if the pack change is permanent.
Location exclusions	Destinations that should be completely excluded from the change. Each location is marked as being excluded as a primary destination and/or a secondary destination. All destinations lower than an excluded primary destination are also automatically excluded unless the downstream destination is multi-supplied and its other source is included in the pack change.

Maintenance

You can update certain aspects of the Pack Change Event, cancel the event altogether, or simply initiate event re-creation in order to capture sourcing or lead time changes.

Where an event is being changed/re-created after the initial creation the existing event pack changes, for the event in question, are removed so that a complete re-spread of the changes can take place.

When the event is being canceled no further processing occurs after removal except to update the event status indicating that all pending changes have been applied.

Calculation

For each Pack Change Event with pending changes, calculation begins with the sources directly defined in the event and their destinations are found. The destinations are then used as sources and the process is repeated, finding new destinations, until no destinations are found. Destinations that either have no lead times, or do not order the change-from pack will have a pack change recorded and will not be processed as a source. This assumes that if a destination does not order the pack its downstream locations do not either, because the pack would never be available at the source.

For each source/destination the appropriate start date (starting delivery date) and end dates are found using the raw ordering cycle (end date is ignored if the pack change is permanent).

The start date for a source/destination is the date that is:

- The first delivery opportunity that orders from a source on or after the source's start date (the First Order Date in the case of the top level event source)
- Before a defined end date (the Last Order Date in the case of the top level event source).

When the pack change is temporary the ordering pack is changed back on the next ATP day that orders from the source after the Last Order Date.

While a pack change can be recorded between a secondary source and destination it will not trigger any changes downstream of the destination. The destination must have a primary source participating in the pack change in order to cause additional changes downstream.

Event Status Update

The final step is to update the event status. If cancelling the Pack Change Event, it should be set to Canceled. The status should be set to Open for any other update.

