

**Oracle® Retail Advanced Inventory Planning**

Data Management User Guide

Release 16.0

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Oracle Retail Advanced Inventory Planning Data Management User Guide, Release 16.0.

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

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# Preface

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

## Audience

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

## Documentation Accessibility

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## Related Documents

For more information, see the following documents in the Oracle Retail Advanced Inventory Planning Release 16.0 documentation set:

- *Oracle Retail Advanced Inventory Planning Administration Guide*
- *Oracle Retail Advanced Inventory Planning Data Management Online Help*
- *Oracle Retail Advanced Inventory Planning Data Management User Guide*
- *Oracle Retail Advanced Inventory Planning Data Model Volume 1—Oracle Database Data Model*
- *Oracle Retail Advanced Inventory Planning Data Model Volume 2—Measure Reference Guide*
- *Oracle Retail Advanced Inventory Planning Implementation Guide*
- *Oracle Retail Advanced Inventory Planning Installation Guide*
- *Oracle Retail Advanced Inventory Planning Operations Guide*
- *Oracle Retail Advanced Inventory Planning Order Management Online Help*

- *Oracle Retail Advanced Inventory Planning Order Management User Guide*
- *Oracle Retail Advanced Inventory Planning Release Notes*
- *Oracle Retail Advanced Inventory Planning Security Guide*
- *Oracle Retail Advanced Inventory Planning Store and Warehouse Replenishment Planning Online Help*
- *Oracle Retail Advanced Inventory Planning Store and Warehouse Replenishment Planning User Guide for the RPAS Fusion Client*

The following documentation may also be needed when implementing AIP:

- Oracle Retail Predictive Application Server Batch Script Architecture (RPAS 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 16.0 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 Supply Chain Creation AIP White Paper 16.x* (Doc ID 2184447.1 )
- *Oracle Retail AIP Order Review and Approval Workbook Configurations* (Doc ID 2076972.1)
- *Oracle Retail Advanced Inventory Planning Online Bypass 16.x* (Doc ID 2206617.1)

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- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

## **Review Patch Documentation**

When you install the application for the first time, you install either a base release (for example, 16.0) or a later patch release (for example, 16.0.1). 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
<b>boldface</b>	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.



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# 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 Online 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. Launch the AIP Online application URL. The home page opens.
2. Click either **AIP Online DM** or **AIP Online OM** to start the application.
3. Open or Save the AIP Online application JNLP file.(Java Web Start)
4. Open the application with the Java Web Start Launcher and click **OK**. The login window opens.
5. Enter your User ID and Password in the appropriate fields.
6. After logging in, click **Start** to open the AIP application, either **AIP Online DM** or **AIP Online OM**.The application opens in a new window.

## Changing Your Password

Perform the following steps to change your password:

1. Log in to AIP Online following the instructions in [Logging on to Oracle Retail Advanced Inventory Planning \(AIP\)](#).
2. Click **Change Password**.
3. In the Current Password field, enter the password you used to log in to the application.
4. In the New Password field, enter the password you want to use in the future.
5. In the Retype password field, enter the password you entered in the New Password field.
6. Click **Change Password**.

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

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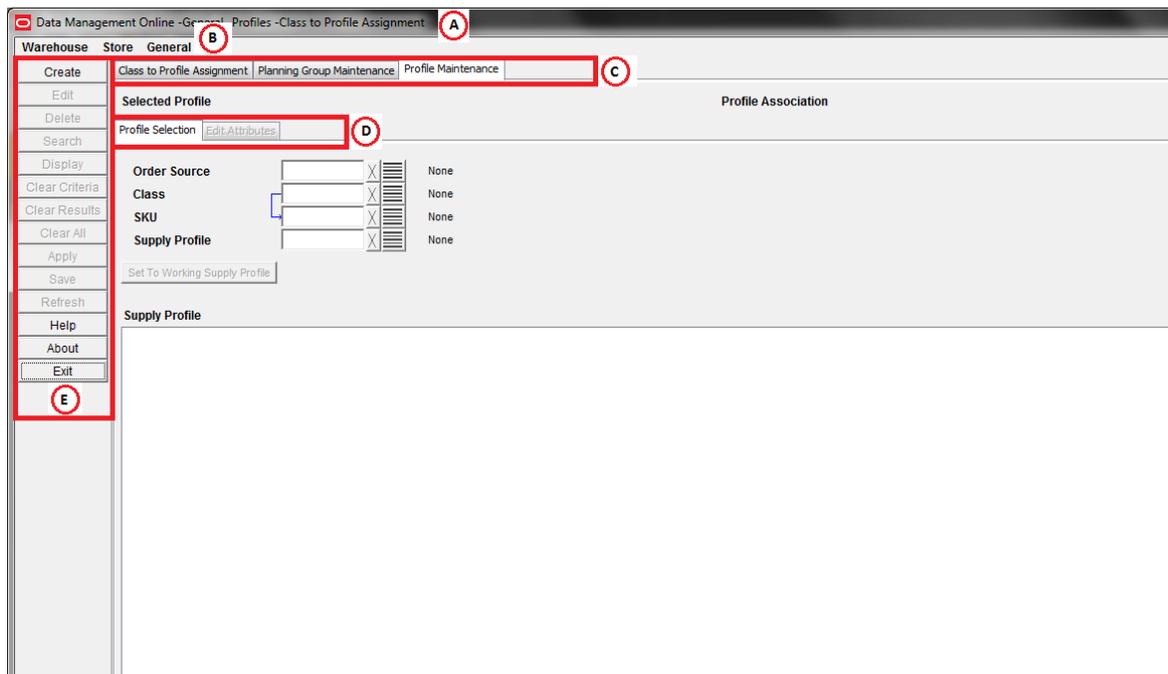
## Exiting AIP

To exit any AIP Online application click the Close icon.

## The AIP Workspace

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

**Figure 2-1 AIP Workspace**



**Table 2–1 AIP Workspace Elements**

Item	Element	Description
A	Title Bar	Located at the top of the application window. The title bar displays the product name and the area you are currently working in. The three buttons at the far right on the title bar allow you to minimize, restore, maximize, and close the application window.
B	Menu Bar	Located underneath the title bar. The menu bar provides access to different areas of the application.
C	Primary Tabs	Located at the top of the workspace. The primary tabs give you access to the functional areas available for the selections you made from the menu.
D	Secondary Tabs	Located in the workspace, beneath the primary tabs. The secondary tabs give you access to the functional area within each primary tab, if they exist for a specific tab.
E	Standard Buttons	Located at the left of the workspace. The standard buttons are enabled based on the work you have done or the selections you make in the workspace.

## Navigating AIP

The basic method for entering data in a text field is to type the text in the field.

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

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

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

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

### Using a Calendar Button

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

**Figure 2–2 Date Picker Window**



### Select a Date

Perform the following steps to select a date:

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

---



---

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

---



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

### Move the Date

You can move the selected date forward or backward.

## Using a Drop-down List

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

**Figure 2–3 Drop-down List**



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

## Field-Level Filtering in AIP

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

---



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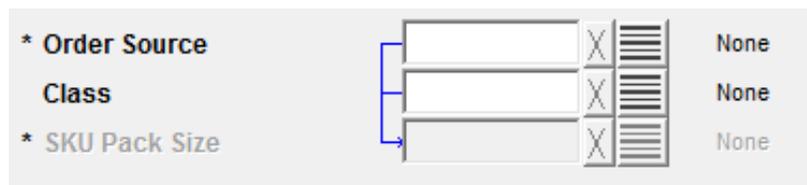
**Note:** Fields that are required when searching are indicated with an asterisk (\*).

---



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**Figure 2-4 Example of Field-Level Filters**



**Table 2-2 Description of Field-Level Filters**

Field Name	Results in Limits to:	Indicated by:
Order Source, Class, and 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 2-5 Clear LOV Button**



To clear the field, click the clear LOV button.

**Figure 2-6 Locked Filter Field**



### Sorting Rules

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

**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"> <li>■ Removing assigned values, which places them back in the available list.</li> <li>■ Adding values, which places them in the selected list.</li> </ul>

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

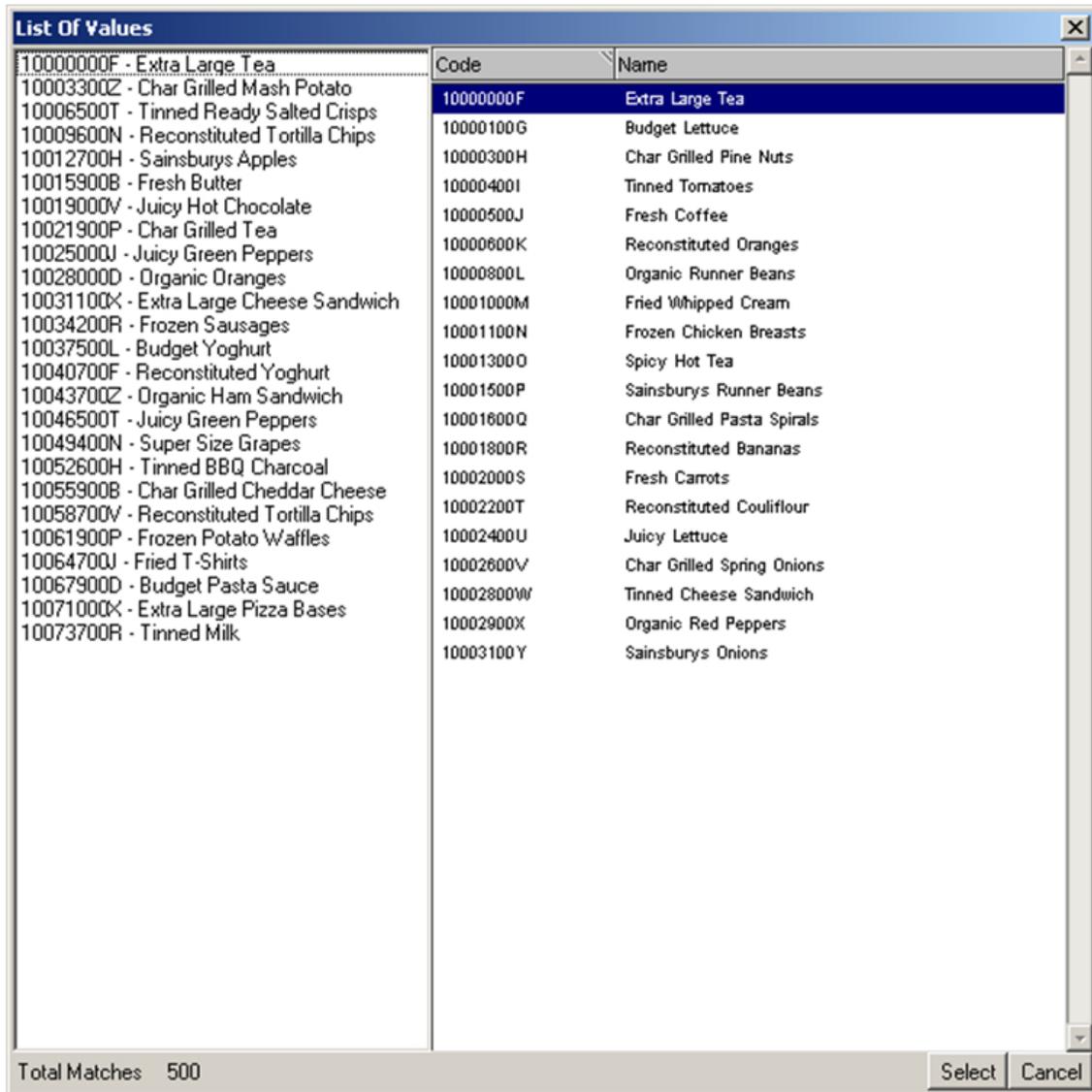
The list of values window displays the first set of 20 values and a paging mechanism. To view additional sets of information, select from the list on the left side.

### Using LOV Buttons

Perform the following steps to use the LOV button:

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

**Figure 2-7** List of Values Window




---

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

---

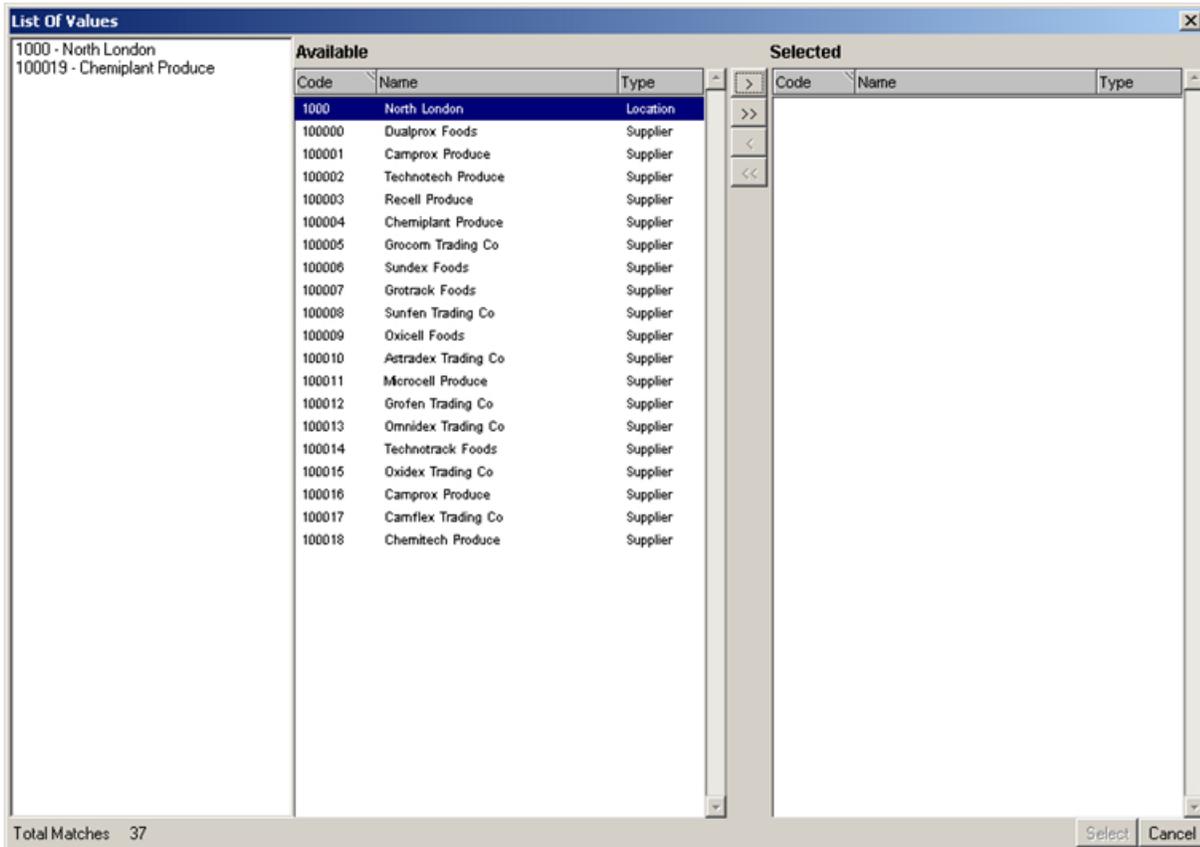
2. Select a value. Page as necessary to find your value.
3. Click **Select**. The field is automatically filled in with the selected value.

### Using a Multi-Select LOV Button

Perform the following steps to use the multi-select LOV button:

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

**Figure 2–8 List of Values Window - Multi-select View**




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

---

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

---

**Note:** To move all values displayed in the available area, click the Move All Right button.

---

3. Remove unnecessary values:
  - Select one or more values in the selected values box.
  - Click the Move Left button. The values are removed from the selected values box.

---

**Note:** To move all values displayed in the selected area, click the Move All Left button.

---

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

## Transfer Boxes

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

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

### Move Buttons

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

**Table 2–4** *Move Button Descriptions*

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

### Using a Transfer Box

Perform the following steps to use a transfer box:

1. Select the appropriate values:
2. Select one or more values in the available values box.
3. Click the Move Right button. The values are moved to the selected values box.

---

**Note:** To move all displayed values, click the Move All Right button.

---

4. Remove unnecessary values:

5. Select one or more values in the selected values box.
6. Click the Move Left button. The values are returned to the available values list.

---

**Note:** To move all displayed values, click the Move All Left button.

---

### Moving Top Level Folders and Folder Components

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

### Sorting a Table

In a table you can sort the results:

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

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

Alert Status	Alert	Priority	Alert Type	Alert Date
Closed	A source split was assigned to a single source when more than one source exists for: Effective Date 11-APR-06, Source 100139, Demand Group 100556 , 2	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 2–10 Example of Paging Controls**



**Table 2–5 Description of Paging Controls**

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

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

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**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.

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## 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 Pre-allocation](#)
- [Maintain Cross-dock](#)

### 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 3–2 Pre-Allocation Window

Class	SKU	Warehouse	Pre-allocate	Must Consume	Staging Window	Pre-release Window
		W1000 - N American Import WH	<input checked="" type="checkbox"/>	<input 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"> <li>■ All Shows all selected warehouse destinations. In the grid, the Class and SKU columns are empty for these rows.</li> <li>■ 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.</li> <li>■ 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.</li> </ul>
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"> <li>■ All—returns all possible combinations of source/destination limited only by other search criteria.</li> <li>■ 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.</li> <li>■ 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.</li> </ul>
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 3–2, "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 3–3 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"> <li>▪ <i>Blank</i> Displays for undefined rows. You cannot change a saved row back to blank.</li> <li>▪ Pre-allocated If selected, then the <b>Must Consume</b> and <b>Pre-release Window</b> fields are enabled and editable.</li> <li>▪ Not Pre-allocated If selected, then all other fields are cleared and unavailable.</li> </ul>
Must Consume	If selected, the <b>Staging Window</b> 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 <b>Cancel</b> to clear all unsaved changes when confirmed on a secondary Confirm window.
Reset	Click <b>Reset</b> to clear all unsaved changes when confirmed on a secondary Confirm window.
Save	Click <b>Save</b> to commit changes to the database, close the <a href="#">Edit Pre-allocation Window</a> , 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 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).

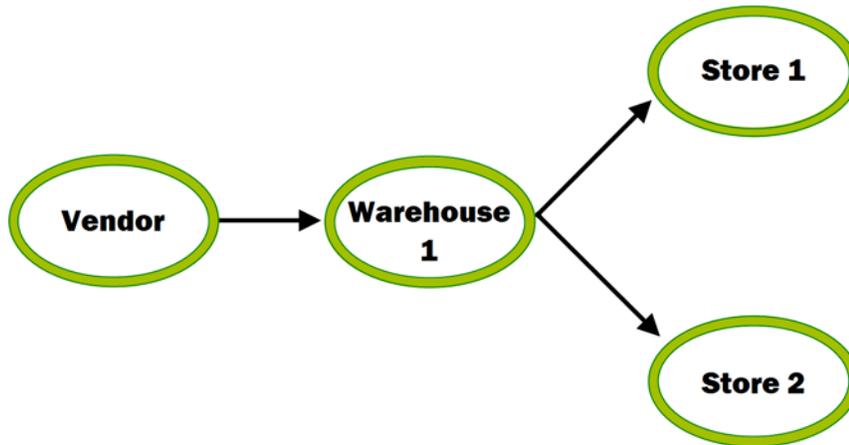
### Supply Chain Process with Cross-docking

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.

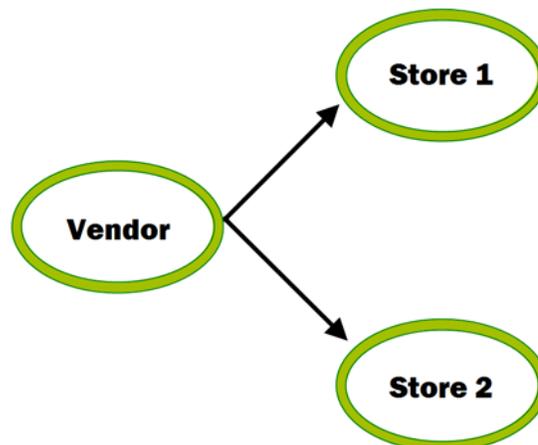
The warehouses that the cross-dock flows through is hidden from planning to ensure that inbound and outbound quantities are completely aligned and there is no ability to

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 3–4** *Physical Supply Chain Cross-docked from Supplier to Store*



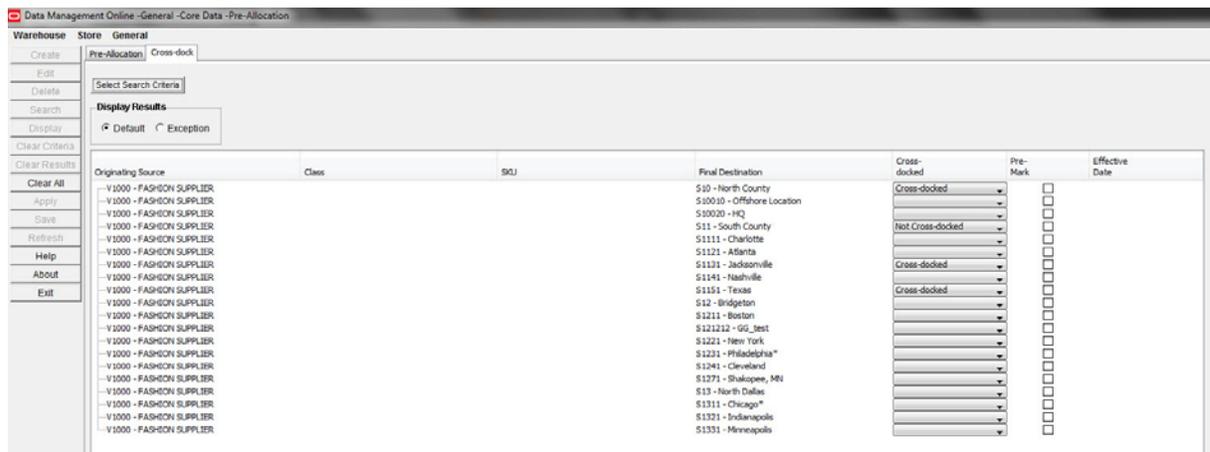
**Figure 3–5** *User Setup Supply Chain*



### Setting Cross-dock Routes

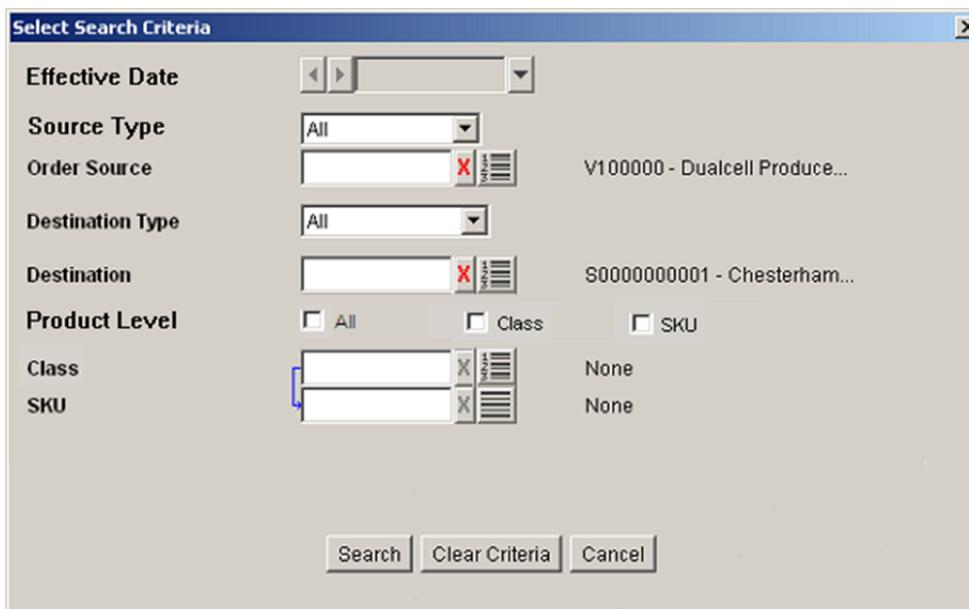
**Navigate:** Log into Data Management. From the General menu, select Core Data and then click the Cross-dock tab.

Figure 3–6 Cross-dock Route Tab



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

Figure 3–7 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"> <li>■ ALL (for suppliers and warehouses)</li> <li>■ Suppliers Only (for suppliers only)</li> </ul> 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

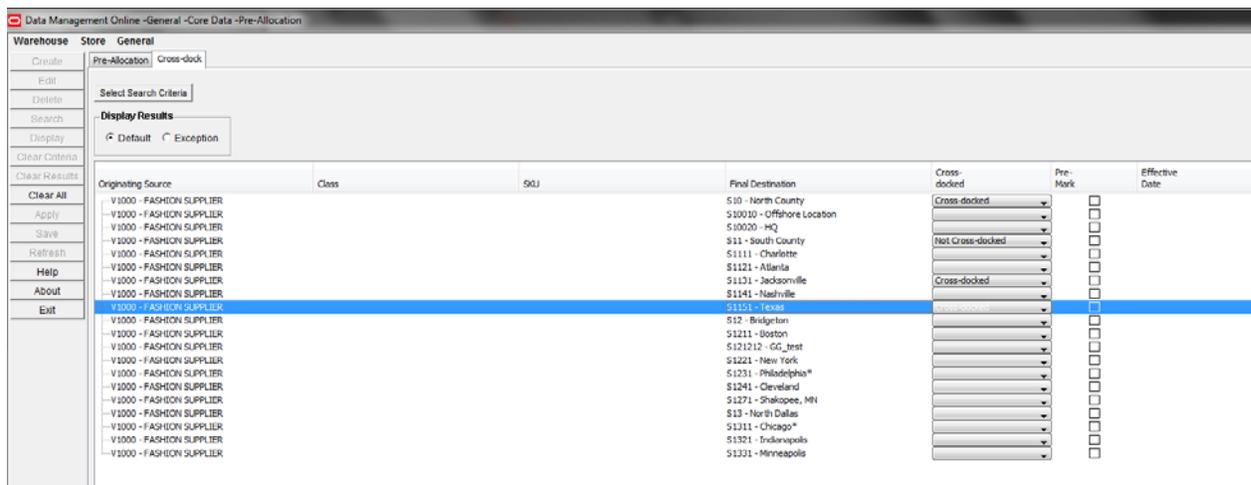
Field	Description
Order Source LOV	Displays valid sources of suppliers or warehouses.
Destination Type	This drop-down list provides the options of either: <ul style="list-style-type: none"> <li>Stockholding stores</li> <li>Stockholding warehouses</li> </ul> Note: Selecting a Destination Type limits the 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"> <li>All—returns all possible combinations of source/destination limited only by other search criteria.</li> <li>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.</li> <li>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.</li> </ul>
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"> <li>At least one Source and Destination is selected</li> <li>At least one Product Level is selected</li> <li>If the SKU check box is selected, then at least one Class must be selected</li> </ul> Clicking <b>Search</b> 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 <b>Clear Criteria</b> resets the <a href="#">Select Search Criteria Window</a> to its original state.
Cancel	Clicking <b>Cancel</b> opens a cancel confirmation message and if accepted, then returns you to the <a href="#">Cross-dock Route Tab</a> .

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

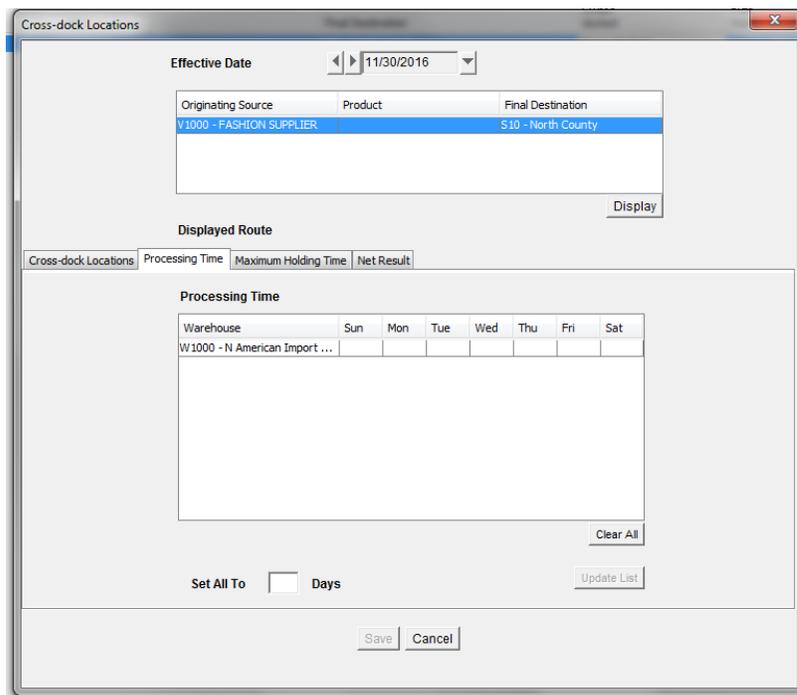
Figure 3–8 Cross-dock Route Details Window



5. 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 3–9 Cross-dock Default Details Window



6. 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.

Window Details	Description
Selected Routes	Displays the selected routes from the <a href="#">Cross-dock Route Details Window</a> .
Display Button	This button is unavailable until a route is selected in the grid. Clicking <b>Display</b> 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 <b>Save</b> updates any changes and returns you to <a href="#">Cross-dock Route Tab</a> .
Cancel Button	Clicking <b>Cancel</b> clears any changes and returns you to <a href="#">Cross-dock Route Tab</a> .

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 3–9, "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 3–1** *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.

**Table 3–1 (Cont.) Cross-dock Locations Tab Description**

Tab Details	Description
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 <b>Update List</b> 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 <b>Save</b> 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"> <li>■ 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.</li> <li>■ 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.</li> </ul>
Cancel Button	Clicking <b>Cancel</b> clears any changes prior to <b>Save</b> .

### Processing Time Tab

Figure 3–10 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 3–10 Processing Time Tab**

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

**Table 3–2 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 <b>Set all to</b> field and then click <b>Update List</b> .
Update List	Available when a valid value is entered in the <b>Set all to</b> field.
Save Button	<b>Save</b> is available when any required valid values exist for all cells. <b>Save</b> saves any processing time updates for the cross-docked route.
Cancel Button	Clicking <b>Cancel</b> clears any changes prior to <b>Save</b> .

**Maximum Holding Time Tab**

Figure 3–11 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 3–11 Maximum Holding Time Tab**

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

**Table 3–3 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 <b>Set all to</b> field and then click <b>Update List</b> .
Update List	Available when a valid value is entered in the <b>Set all to</b> field.
Save Button	<b>Save</b> is available when any required valid values exist for all cells. <b>Save</b> saves any processing time updates for the cross-docked route.
Cancel Button	Clicking <b>Cancel</b> clears any changes prior to <b>Save</b> .

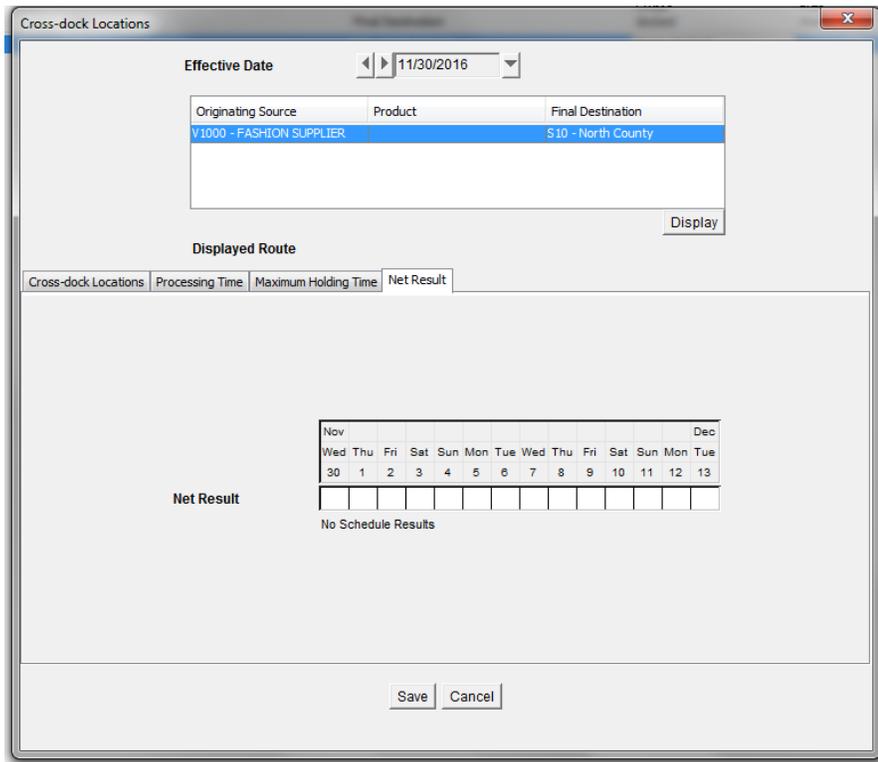
### Net Result Tab

Figure 3–12 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 3–12 Net Result Tab**



## Profiles

This section includes:

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

### 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 3–13 Profile Selection Tab**

The screenshot shows the 'Data Management Online - General - Profiles - Class to Profile Assignment' window. The 'General' tab is active, and the 'Profile Selection' sub-tab is selected. The 'Selected Profile' section shows the following assignments:

Field	Value
Order Source	None
Class	1102_1 - All Purpose*
SKU	None
Supply Profile	None

Below the assignments, there is a 'Set To Working Supply Profile' button and a 'Supply Profile' section with the value 'V7777 - Wh prof V7777'. A left-hand menu contains buttons for Create, Edit, Delete, Search, Display, Clear Criteria, Clear Results, Clear All, Apply, Save, Refresh, Help, About, and Exit.

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

**Figure 3–14 Create Supply Profile Window**

The screenshot shows the 'Create Supply Profile' dialog box. The fields are as follows:

Profile Code	61
* Profile Name	<input type="text"/>
Profile Association	Warehouse
* Store Order Cycle	<input type="text"/> <input type="button" value="X"/> <input type="button" value="List"/>
Direct Supplier	<input type="text"/> <input type="button" value="X"/> <input type="button" value="List"/>

Buttons for 'Save' and 'Cancel' are located at the bottom of the dialog.

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 3–15 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 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 tab.

**Figure 3–16 Profile Selection Tab**

The screenshot shows the 'Profile Selection' tab in the 'Class to Profile Assignment' window. The 'Profile Selection' section contains a table with the following data:

Order Source	Class	SKU	Supply Profile
	1102_1 - All Purpose*		

Below the table, there is a 'Set To Working Supply Profile' button and a 'Supply Profile' section displaying 'V7777 - Wh prof V7777'.

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 3–17** 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 3–18 Store Order Cycle Tab

The screenshot shows the 'Store Order Cycle' tab in the 'Class to Profile Assignment' window. The 'Selected Profile' is 'V7777 - Wh prof V7777'. The 'Effective Date' is set to '11/30/2016'. The 'Store Order Cycle' field contains 'PRFWS - New Sup Warehouse to Store OC'. Below this, there are two calendar grids: one for the 'Current Store Order Cycle' and one for 'Default Settings' (Week 1). The 'Current Store Order Cycle' grid shows '1' for all days from Sun to Tue. The 'Default Settings' grid also shows '1' for all days from Sun to Sat.

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

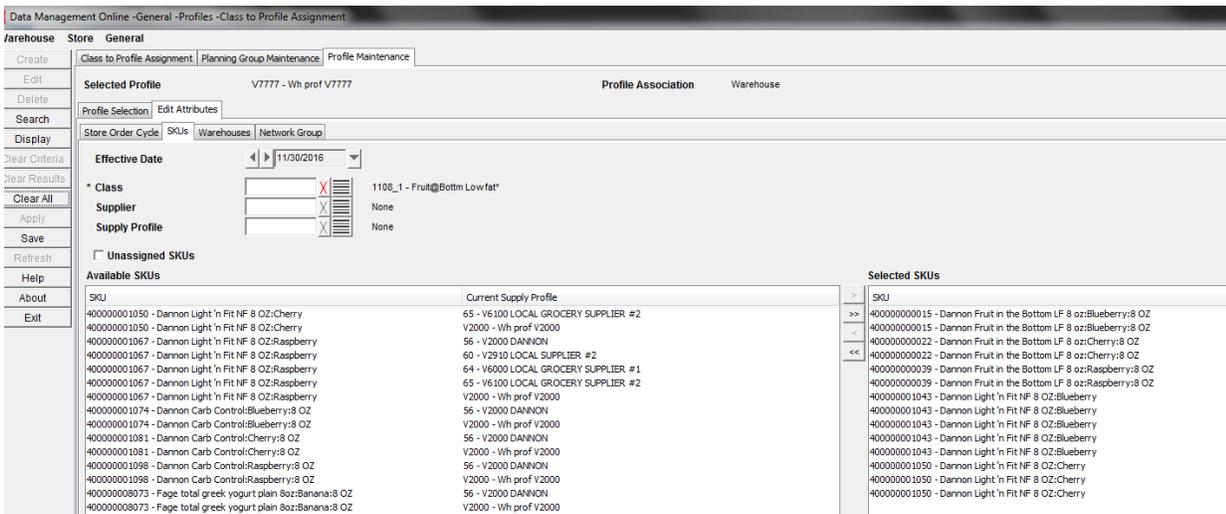
**Navigate:** Log into Data Management. From the General menu, select Profiles. From the Profile Maintenance primary tab, click the Profile Selection secondary tab.

Figure 3–19 Profile Selection Tab

The screenshot shows the 'Profile Selection' tab in the 'Class to Profile Assignment' window. The 'Selected Profile' is 'V7777 - Wh. prof V7777'. The 'Order Source' is 'None', the 'Class' is '1102\_1 - All Purpose\*', the 'SKU' is 'None', and the 'Supply Profile' is 'None'. The 'Set To Working Supply Profile' button is visible. Below these fields, the 'Supply Profile' section shows 'V7777 - Wh. prof V7777' selected.

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

Figure 3–20 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.

---

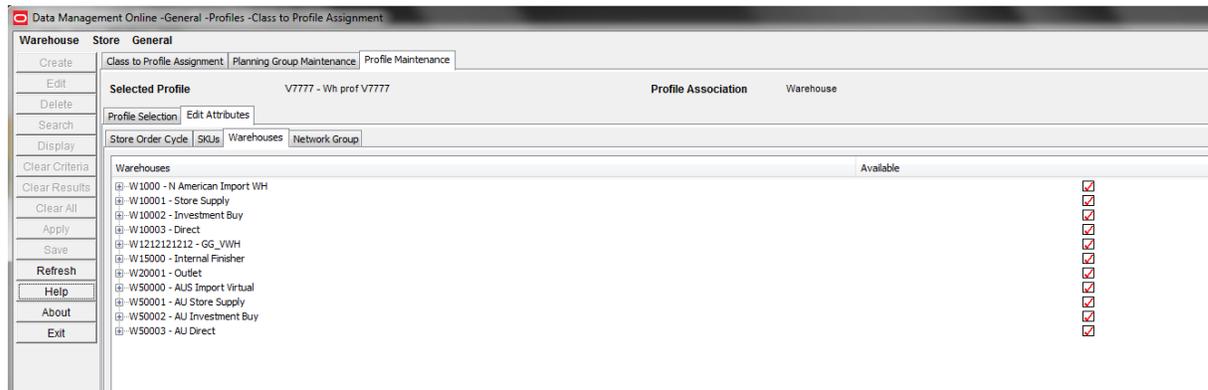
7. Click **Save**. You are prompted to confirm your decision.
8. Click **OK**.

**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 3–21 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**.

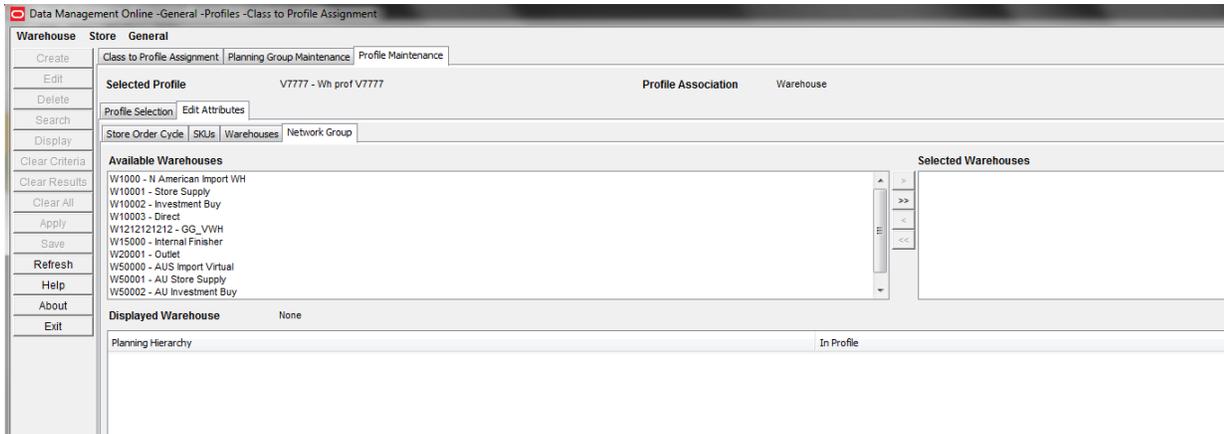
#### Maintain Network Groups for a Profile

**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.

- Click the Network Group tab. The warehouses assigned to the profile are displayed.

**Figure 3–22 Network Group Tab**




---

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

---

- Move the warehouses to the Selected Warehouse area.
- Click **Display**.
- Select the check box next to the planning group to assign a network group.
- Click **Save**. You are prompted to confirm your decision.
- 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 3–23 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.

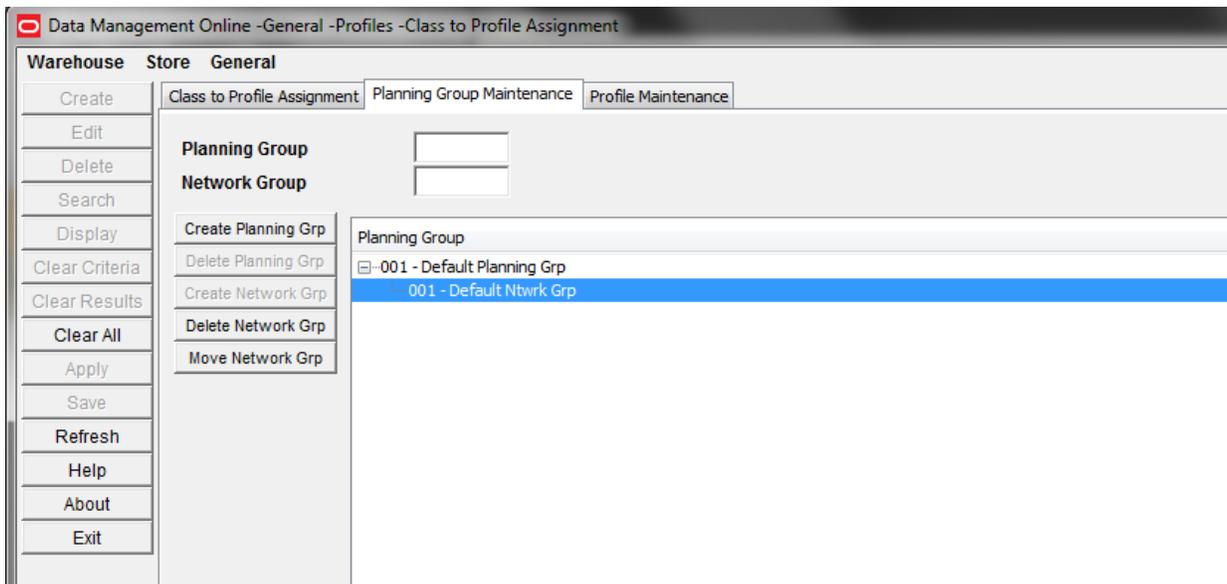
**Table 3–4 Planning and Network Groups**

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 3–24 Planning Group Maintenance Tab**



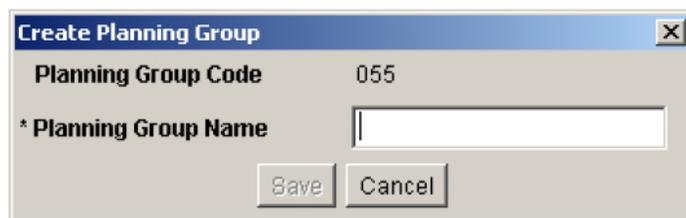
1. In the Planning Group field, enter the planning group ID.
2. In the Network Group field, enter the network group ID.
3. Press **Enter**. The first group that contains an ID that matches the search criteria is selected.

### 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 3–25 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.

---

---

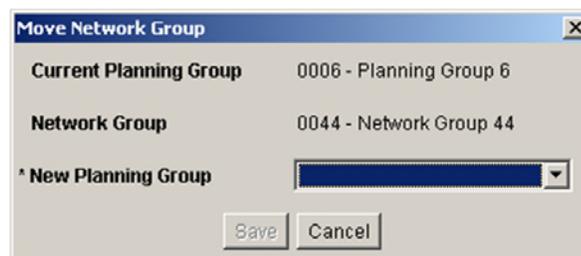
2. Click **Delete Planning Grp**. You are prompted to confirm your decision.
3. Click **OK**.

#### 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 3–26** 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**.

## 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. On the Supplier and Container Scaling Groups primary tab click the Select tab.

**Figure 3–27 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. On the Supplier and Container Scaling Groups primary tab, click the Select tab.

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

**Figure 3–28 Create Scaling Group Window**

2. Complete the fields in the Create Scaling Group window as described in [Table 3–5](#).

**Table 3–5 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 3–5 (Cont.) Create Scaling Group Window Fields**

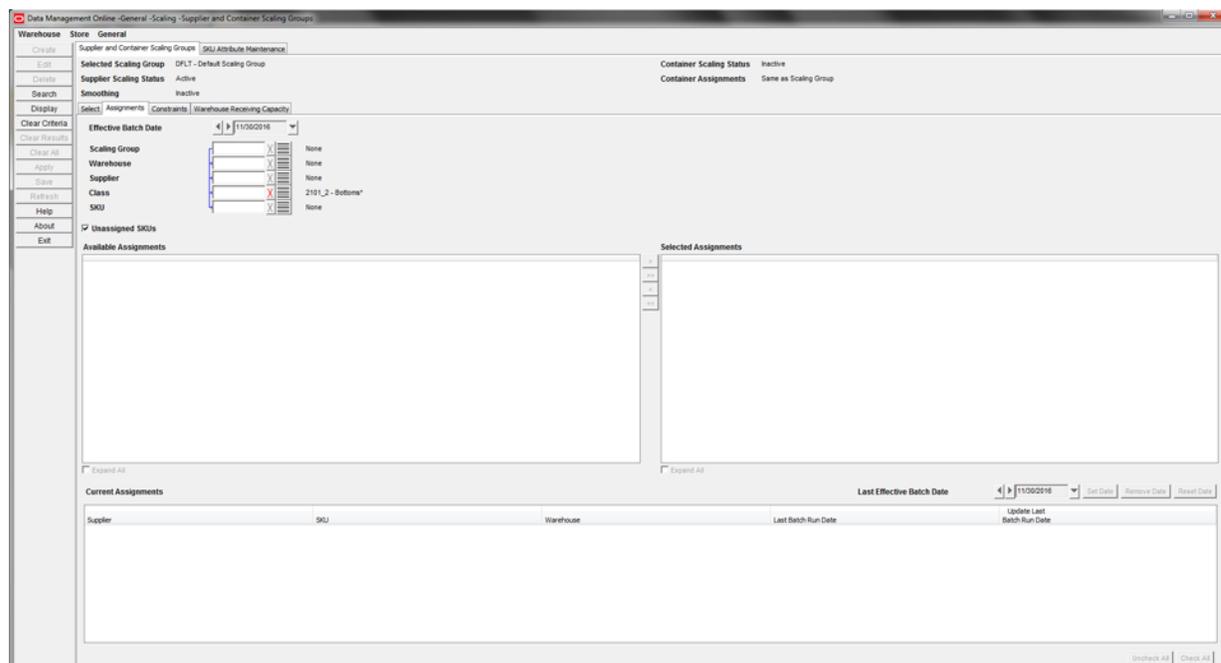
Field	Parameters	Use
Container Assignments	Select either <b>Same as Scaling Group</b> or <b>Expand Scaling Groups</b> .	Available if the Container Scaling check box is selected. Determines whether containers are built for one source/destination each or all in the Scaling Group.
Smoothing	Select or clear 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 3–29 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

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**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.

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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 3–6](#) to edit assignments:

**Table 3–6** *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.	<b>Delete</b>
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.	<b>Set Date</b>
Remove a Last Batch Run Date:	highlight the row in the Current Assignments grid, and select the Update Last Batch Run Date check box.	<b>Remove Date</b>
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.	<b>Reset Date</b>

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 3–30 Supplier and Container Scaling Groups: Constraints Tab**

Effective Release Date	To Release Date	Minimum	Maximum	UOM	Primary Container Constraint
11/09/2016	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 3–31 Create Scaling Groups Constraints: Supplier Constraints Tab**

**Create Scaling Group Constraints**

Copy From Scaling Group:

Copy From Date:

Effective Release Date:   To Release Date   
 No End Release Date

Supplier Constraints | Container Constraints

Cost

Currency: USD  
 Minimum:

Quantity

Type:  Pallets  Cases  Eaches  
 Minimum:

**Figure 3–32 Create Scaling Groups Constraints: Container Constraints Tab**

**Create Scaling Group Constraints**

Copy From Scaling Group:

Copy From Date:

Effective Release Date:   To Release Date   
 No End Release Date

Supplier Constraints | Container Constraints

Volume

UOM: Cubic Feet  
 Minimum:  Maximum:

Weight

UOM: Pounds  
 Minimum:  Maximum:

Quantity

Type:  Pallets  Cases  Eaches  
 Minimum:  Maximum:

Cost

Currency: USD  
 Minimum:  Maximum:

Primary Constraint:  Tolerance:  %

**Entering Container Constraints**

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**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.

---



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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.

---



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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

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---

**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.

---



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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 3–33** *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:** 03/16/2008 (with navigation arrows and a dropdown arrow)
- Release Date Options:** Radio buttons for "To Release Date" (unselected) and "No End Release Date" (selected). The "To Release Date" option has a date field with navigation arrows and a dropdown arrow.
- Constraint Type:** Two tabs are visible: "Supplier Constraints" (active) and "Container Constraints".
- Cost Section:**
  - Currency:** USD
  - Minimum:** An empty text input field.
- Quantity Section:**
  - Type:** Radio buttons for "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 3–34 Edit Scaling Groups Constraints: Container Constraints Tab**

**Edit Scaling Group Constraints**

Scaling Group: V12341234 - Mad Sheep Sau1 CB\_RG

Effective Release Date: 01/25/2008

To Release Date

No End Release Date

Supplier Constraints | **Container Constraints**

Volume

UOM: Cubic Feet

Minimum: [ ] Maximum: [ ]

Weight

UOM: Pounds

Minimum: 22000.00 Maximum: 25000.00

Quantity

Type:  Pallets  Cases  Eaches

Minimum: 25 Maximum: 28

Cost

Currency: USD

Minimum: [ ] Maximum: [ ]

Primary Constraint: Quantity

Tolerance: 0 %

Save Reset Cancel

---

**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 3–35** Warehouse Receiving Capacity Tab

The screenshot displays the 'Warehouse Receiving Capacity' tab in the Data Management Online application. The interface includes a left-hand navigation pane with buttons for 'Create', 'Edit', 'Delete', 'Search', 'Display', 'Clear Criteria', 'Clear Results', 'Clear All', 'Apply', 'Stop', 'Refresh', 'Help', 'About', and 'Exit'. The main content area is titled 'Warehouse Receiving Capacity' and contains several sections:

- Supplier and Container Scaling Group:** DLU Attribute Maintenance
- Selected Scaling Group:** DFLT - Default Scaling Group
- Supplier Scaling Status:** Active
- Smoothing:** Inactive
- Container Scaling Status:** Inactive
- Container Assignments:** Same as Scaling Group
- Display Date:** 11/29/2016
- Available Warehouses:** A list of warehouses (currently empty).
- Selected Warehouses:** A list of selected warehouses (currently empty).
- Displayed Warehouse:** None
- Current Receiving Capacity:** A grid showing capacity for various dates from Nov 29 to Dec 12.
- Capacity Type:** A grid for selecting capacity types.
- Update Day-of-Week Capacity:** A section for configuring day-of-week capacity with a grid for Sun through Sat.
- Receiving Capacity:** A section for configuring receiving capacity with a grid for Sun through Sat.
- Final Receiving Capacity:** A section for configuring final receiving capacity with a grid for Sun through Sat.
- Capacity Type:** Radio buttons for 'Pallets', 'Cases', and 'Eaches'.
- Delete Day-of-Week Capacity Restriction:** A checkbox option.
- Create Receiving Capacity Exception:** A section for creating exceptions with 'From' and 'to' date pickers.
- Delete Receiving Capacity Exception:** A section for deleting exceptions with 'From' and 'to' date pickers.

### 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.

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

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## Search for Classes and SKUs

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

Figure 3–36 SKU Attribute Maintenance Tab

The screenshot displays the 'SKU Attribute Maintenance' tab in the 'Supplier and Container Scaling Groups' section. The interface includes a search criteria area with 'Class' and 'SKU' fields. Below this is a list of classes and their associated SKUs, with a 'Pull Forward Days' column. The 'Set All' area at the bottom has 'Apply To' set to 'Classes' and 'Pull Forward Days' set to 0.

Class	Pull Forward Days
* 1102_1 - All Purpose*	0
100036537 - All Liquid 115 oz	
100036553 - Liquid Gold Spray 9 oz	
100036561 - Thund R Blast 32 oz	
100036570 - Mean Lemon Trig 40 oz.	
100036588 - Pine Power 40 oz.	
100036596 - Oxi Clean 1.5 lbs.	
100036609 - Surf Powder w/Bl 32 oz.	
-1102_2 - Laundry*	0
100036617 - Snuggle Shts Fresh Rain 70 Ct	
100037003 - Snuggle Cuddle up 70 Ct	
100037020 - Q S Laundry Stain Remov Trig32	
100037038 - Snuggle 64 oz.	
100037046 - Snuggle Fresh Rain 64 oz.	
100037054 - Snuggle Fabric Softner 35 Ld	
100037062 - Liquid W/Bleach 100 oz.	
100037071 - Laundry Tab 6 Load	
100045003 - Snuggle 32 oz.	
100073178 - Seventh Generation Fabric Softner 40oz	
-1108_1 - Fruit@Bottom Lowfat*	0
40000000015 - Dannon Fruit in the Bottom LF 8 oz:Blueberry:8 OZ	
40000000022 - Dannon Fruit in the Bottom LF 8 oz:Cherry:8 OZ	
40000000039 - Dannon Fruit in the Bottom LF 8 oz:Raspberry:8 OZ	
400000001043 - Dannon Light 'n Fit NF 8 OZ:Blueberry	
400000001050 - Dannon Light 'n Fit NF 8 OZ:Cherry	
400000001067 - Dannon Light 'n Fit NF 8 OZ:Raspberry	
400000001074 - Dannon Carb Control:Blueberry:8 OZ	
400000001081 - Dannon Carb Control:Cherry:8 OZ	
400000001098 - Dannon Carb Control:Raspberry:8 OZ	
400000008073 - Fage total greek yogurt plain 8oz:Banana:8 OZ	
-1115_2 - Bath*	0
100039009 - Toilet Paper	
100073151 - Kleenex boxed hand towels	
100073160 - Scott Extra soft tissue- 12 roll pack	
-1117_1 - Interior*	0
400000006017 - GE Compact Fluorescent Light Bulb	
-2101_2 - Bottoms*	0
100023007 - Relaxed Fit Jeans:Washed:28W:31	
100023015 - Relaxed Fit Jeans:Washed:28W:32	
100023023 - Relaxed Fit Jeans:Washed:28W:33	
100023031 - Relaxed Fit Jeans:Washed:28W:34	
100023040 - Relaxed Fit Jeans:Washed:28W:35	
100023058 - Relaxed Fit Jeans:Washed:28W:36	

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

### Change Values for All Displayed Classes or SKUs

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

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

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.

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---

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

---

---

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

---

---

## Data Management: Store

This chapter provides information about using Data Management for stores.

### Maintain the Store Source

This section provides information on how to:

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

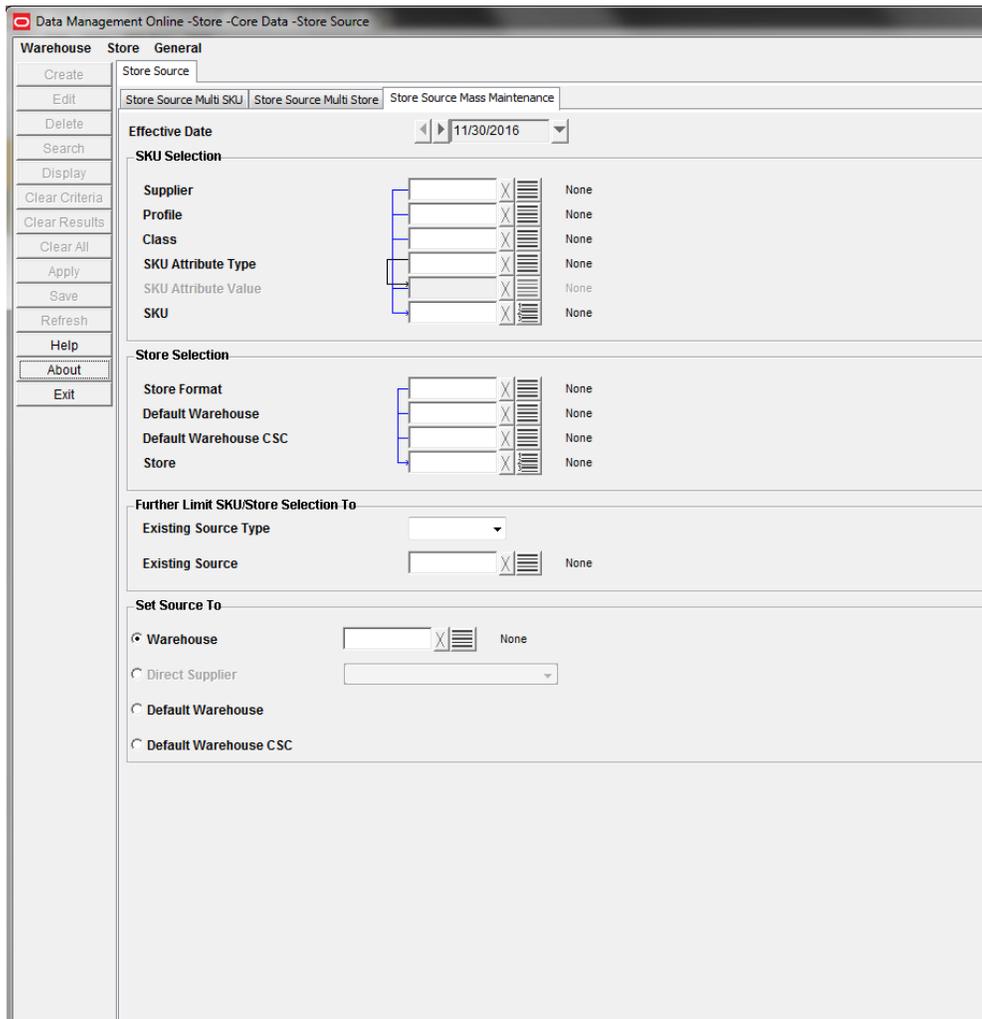
### Perform a Mass Update of the Store Sources

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

#### **Create or Change the Source for Multiple Locations and SKUs**

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

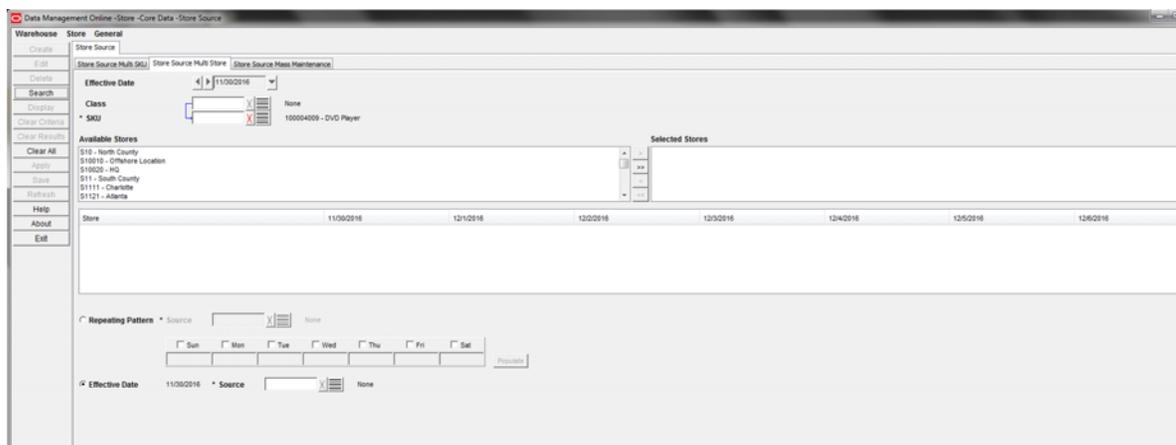
## Effective Date

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.

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

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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.

---

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**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.

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---

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.

---

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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.

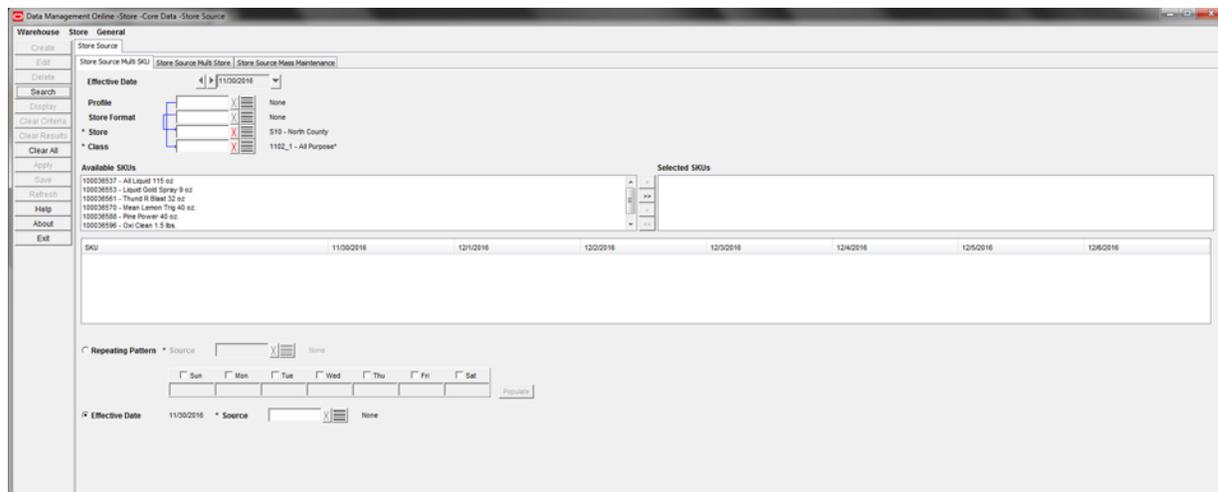
## Effective Date

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**



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 Pack-sizes for Stores](#).

#### 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 4–4** Direct to Store Defaults Tab

	Nov Wed 30	Thu 1	Fri 2	Sat 3	Sun 4	Mon 5	Tue 6	Wed 7	Thu 8	Fri 9	Sat 10	Sun 11	Mon 12	Tue 13
10 - Core Business	12.6	12.6	12.6	12.6	12.6	12.6	12.6	12.6	12.6	12.6	12.6	12.6	12.6	12.6
23 - Outfit	12.6	12.6	12.6	12.6	12.6	12.6	12.6	12.6	12.6	12.6	12.6	12.6	12.6	12.6
9 - Fashion	12.6	12.6	12.6	12.6	12.6	12.6	12.6	12.6	12.6	12.6	12.6	12.6	12.6	12.6

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.

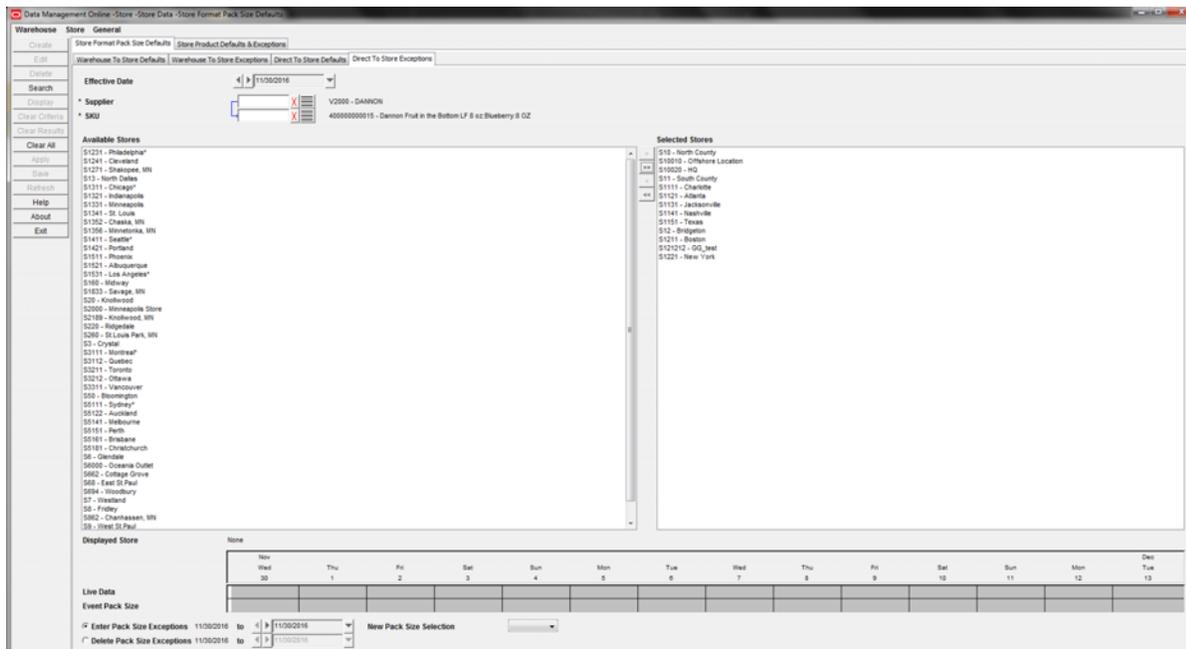
---

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 4–5 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 4–6 Warehouse to Store Defaults Tab**

The screenshot shows the 'Warehouse to Store Defaults' tab in the 'Store Format Pack Size Defaults' window. The 'Effective Date' field is set to 11/02/2016. The 'Class' field is set to 'None' and the 'SKU' field is set to '10004000 - DVD Player'. The 'Available Warehouses' and 'Selected Warehouses' panes are currently empty. The 'Displayed Warehouse' is set to 'None'. The 'New Pack Size Selection' table is as follows:

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	
10 - Core Business																						
23 - Outlet																						
8 - Fashion																						

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.

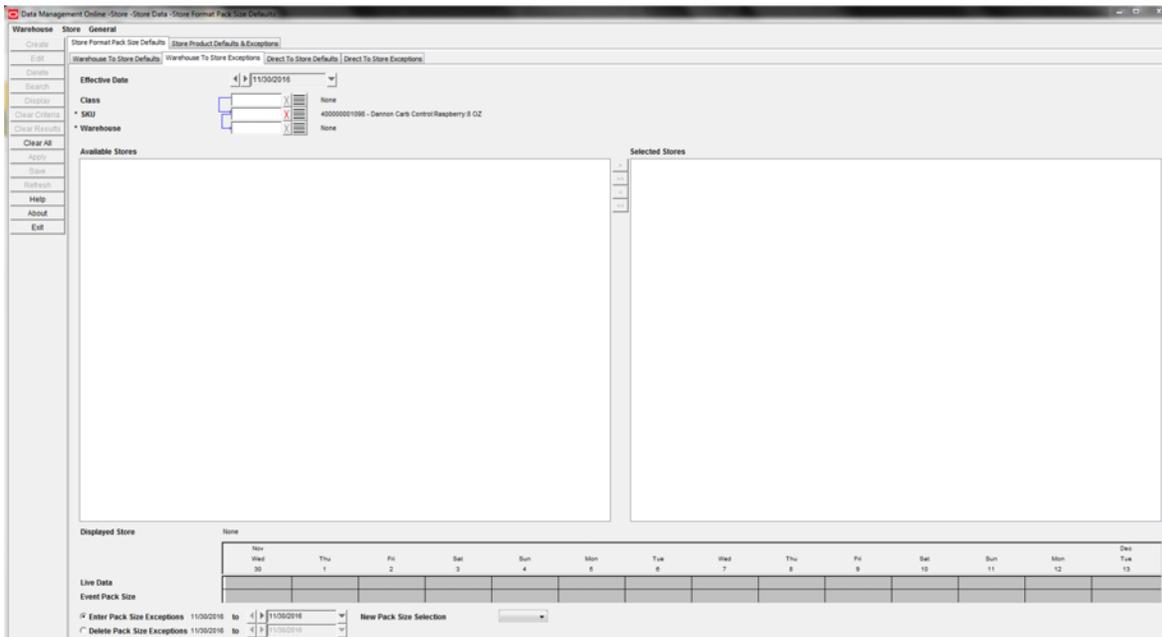
---

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 4-7 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**.

## Define Store Exceptions

This section provides information on [Maintain Exceptions to the Release Schedules](#)

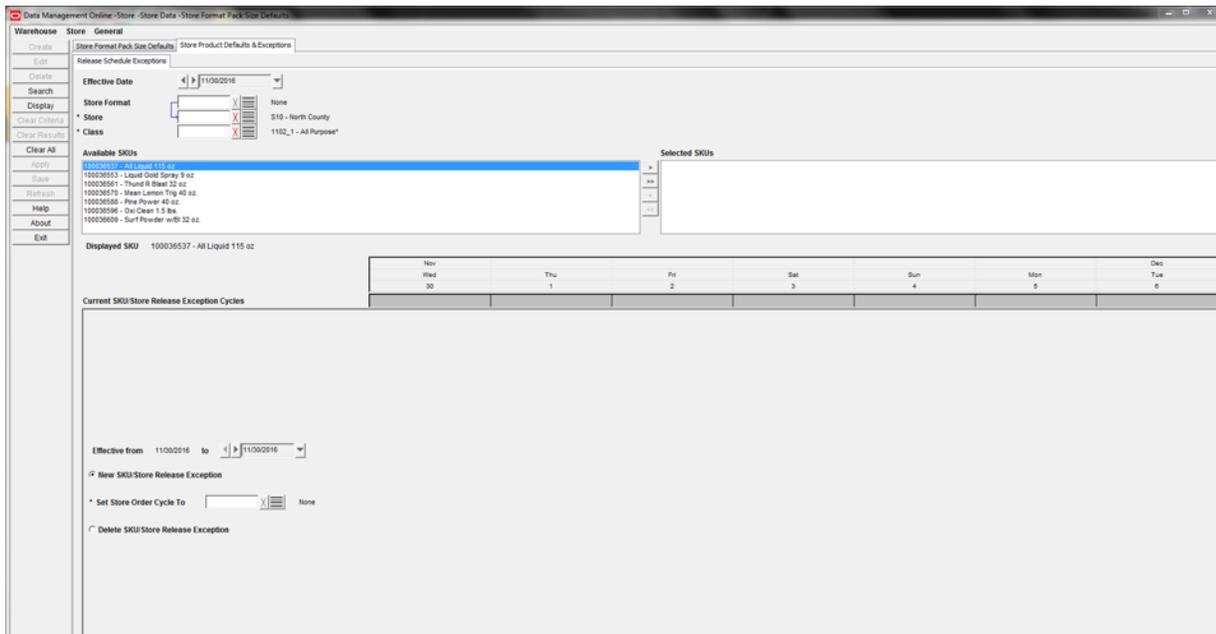
### Maintain Exceptions to the Release Schedules

The Release Schedule Exception window allows you to set new SKU/store release schedule exceptions 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 4–8 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.
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**.

**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**.

## **Create Store Ordering Parameters**

This section provides information on [Maintain Store Order Cycles](#).

### **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.

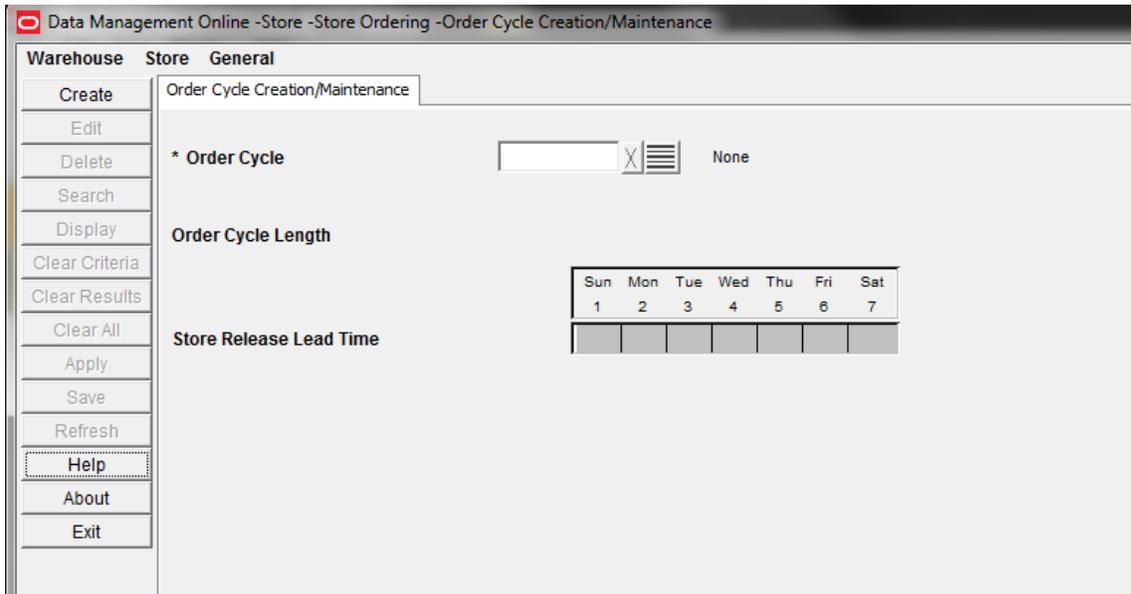
You can only create and delete store order cycles. When you create order cycles, the order cycle code must consist of five alphanumeric characters and be unique.

For each delivery there is a line to enter a release lead-time for every day in the cycle.

#### **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 4–9 Order Cycle Creation/Maintenance Tab**



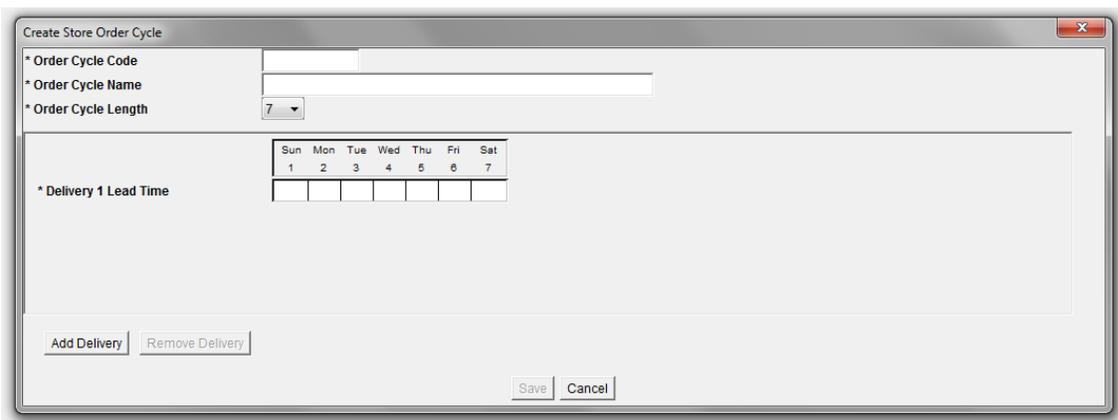
1. In the Order Cycle field, select the order cycle you wish to view from the Order Cycle LOV button.
2. Click **Display**.

**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 4–10 Create Order Cycle Window**



2. In the Order Cycle Code field, enter a code for the order cycle.
3. In the Order Cycle Name field, enter a name for the order cycle.
4. In the Order Cycle Length field, select the length of the order cycle.

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

### 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**.



---

---

## Data Management: Warehouse

This chapter provides information about using Data Management for warehouses.

### Core Data

This section provides information on [Ranging](#).

### 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**.

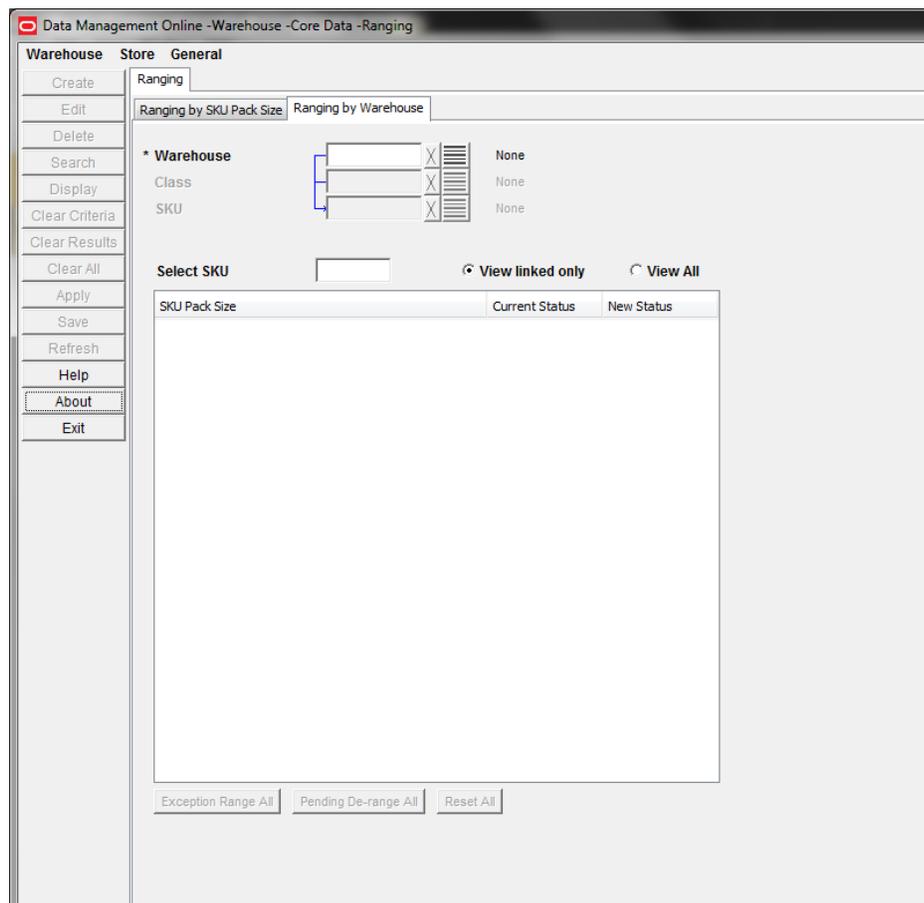
### Range Locations by Warehouse

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**.

## Define Warehouse Defaults and Exceptions

This section provides information on [Define Warehouse Defaults](#).

### Define Warehouse Defaults

This section provides information on how to:

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

#### 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 5–3 Pallet and Order Multiples Tab - Warehouse

The screenshot shows the 'Warehouse Product Defaults & Exceptions' window with the 'Pallet and Order Multiples' tab selected. The 'Effective Date' is 11/09/2016 and 'Unit of Measure' is 'Cases'. There are three search criteria: 'Order Source', 'Class', and 'SKU Pack Size', each with a 'None' value and a 'X' button. Below these are 'Available Locations' and 'Selected Locations' lists. At the bottom, there are two tables: 'Pallet Multiple by Delivery Date' and 'Order Multiple by Delivery Date', both showing a grid of empty cells for dates from Nov 30 to Dec 13. There are also two input fields: 'Set Pallet Multiple To' and 'Set Order Multiple To', both currently empty.

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

### Define Pallet Multiple and Order Multiples

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

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

## Create Warehouse Ordering Parameters

This section provides information on:

- [Order Groups](#)
- [Maintain Order Cycles](#)
- [Selecting the Default Orderable Unit for a Warehouse](#)
- [Time Balanced Order Source Splits](#)

### 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 5–4 Order Groups Tab

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

Figure 5–5 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.

---



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**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.

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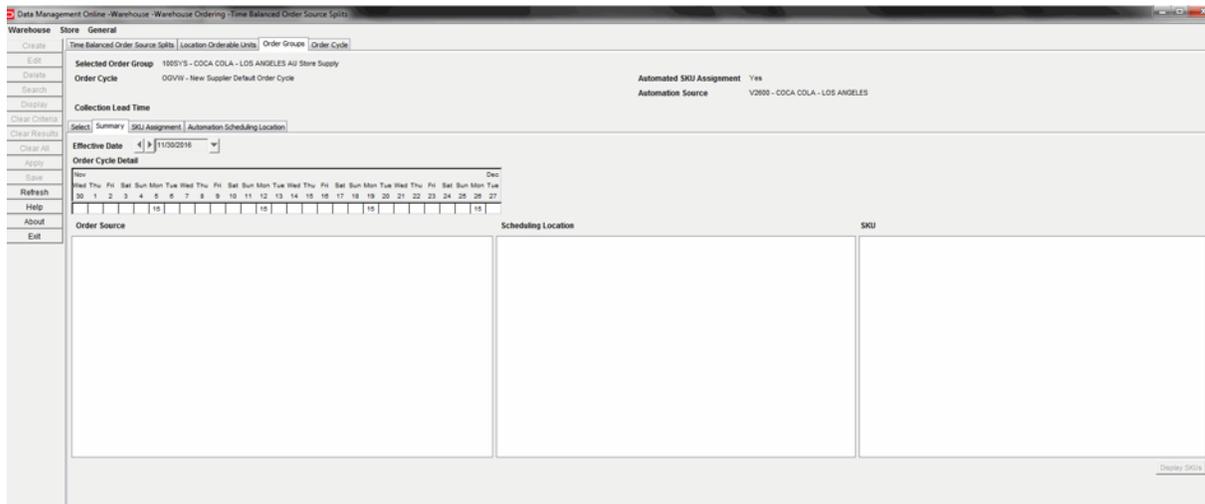
### Delete an Order Group

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 5–6 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	Select the following option to limit or expand the search results displayed. <ul style="list-style-type: none"> <li>■ <b>Both:</b> Returns all matching search results regardless of whether they are assigned to an order group with automated SKU assignments enabled or unavailable.</li> <li>■ <b>Yes:</b> Returns only matching search results which are assigned to an order group with automated SKU assignment enabled.</li> <li>■ <b>No:</b> Returns only matching search results which are assigned to an order group with automated SKU assignment unavailable.</li> </ul>

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

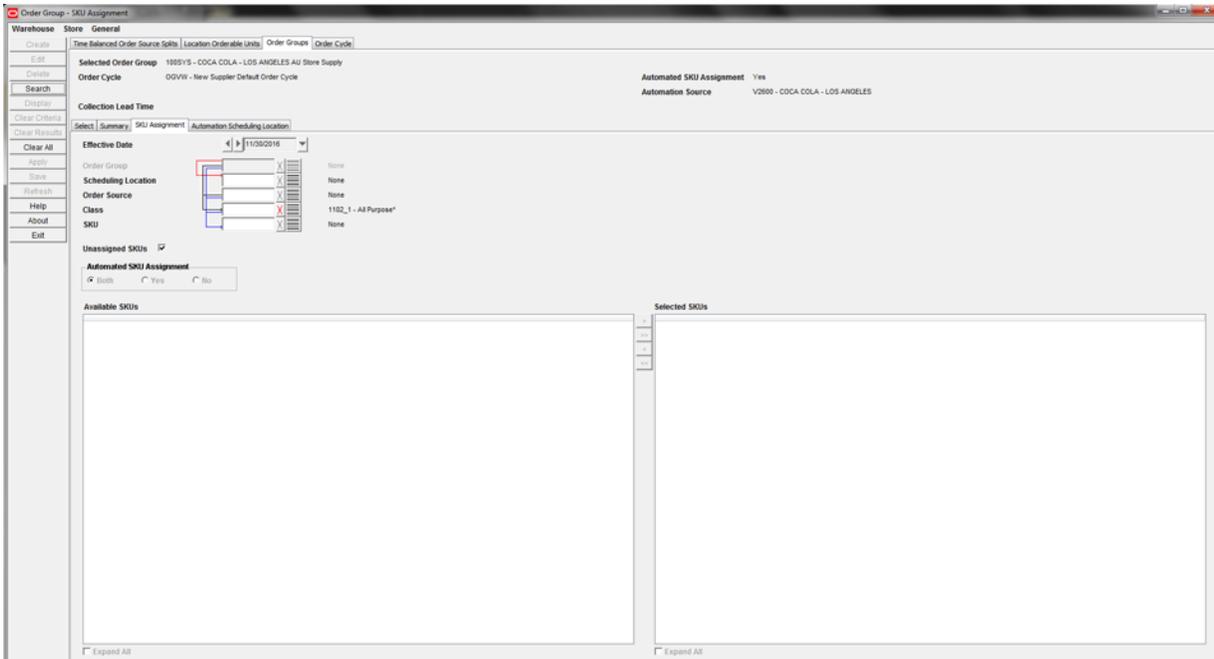
5. Click **Set As Working Group**.

### 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 5–7 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 5–8 Summary Tab**

The screenshot shows the 'Order Group - SKU Assignment' application window. The 'Summary' tab is selected. The 'Effective Date' is set to 12/11/2015. The 'Order Cycle Detail' table shows the following data:

Dec	Jan												
Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu
1	1	1	1	1	1	1	1	1	1	1	1	1	1

The 'Order Source', 'Scheduling Location', and 'SKU' columns are as follows:

Order Source	Scheduling Location	SKU
V2900 - LOCAL SUPPLIER #1	W2000201 - AU Investment Buy 0	100013010 - 20 oz Scented Jar Candle Cinnamon

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.

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- 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.

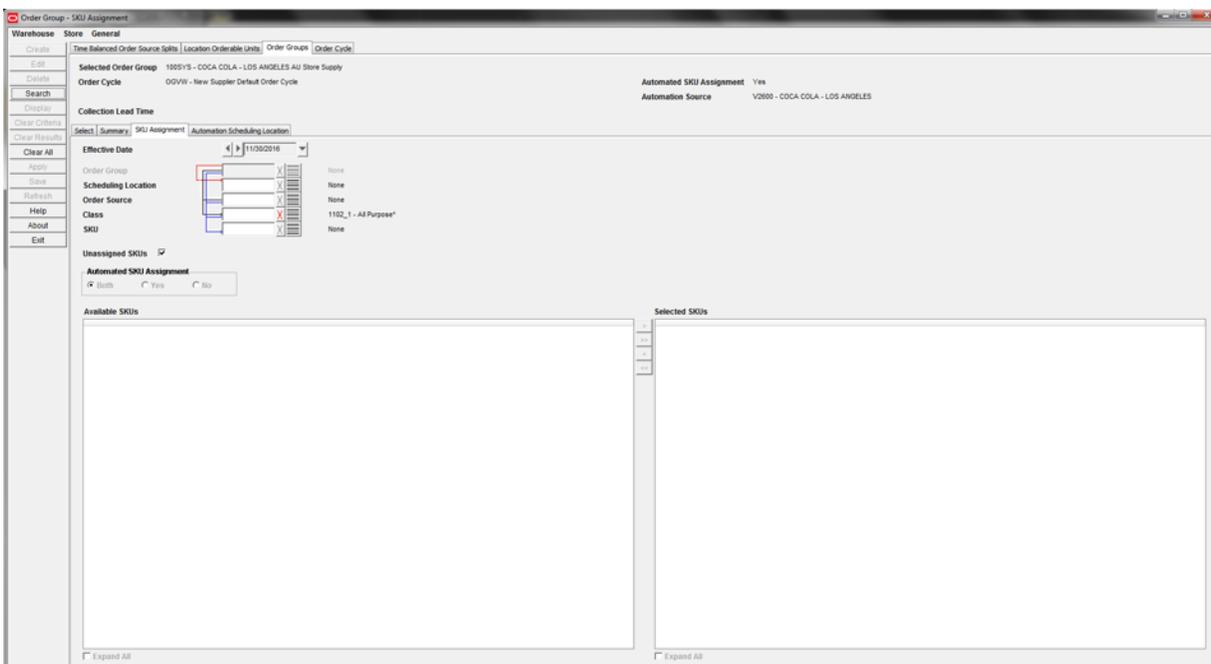
- Click **SKUs** to display a list of SKUs limited by selections in the Supplier and Scheduling Location lists.

**Assign a SKU to an Order Group**

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

- Set an order group as the working order group.
- Select the SKU Assignment tab.

**Figure 5–9 SKU Assignment Tab**



- In the Effective Date field, select the date you want to view a summary for.
- 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 <b>New</b> or <b>Closed</b> .
Class	Enter the class ID, or click the LOV button and select a class. Entering a class filters SKUs based on the specified class.

Criteria	Description
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.
Automated SKU Assignment	Select the following option to limit or expand the search results displayed: <ul style="list-style-type: none"> <li>▪ <b>Both:</b> Returns all matching search results regardless of whether they are assigned to an order group with automated SKU assignments enabled or unavailable.</li> <li>▪ <b>Yes:</b> Returns only matching search results which are assigned to an order group with automated SKU assignment enabled.</li> <li>▪ <b>No:</b> Returns only matching search results which are assigned to an order group with automated SKU assignment unavailable.</li> </ul>

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

---



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

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

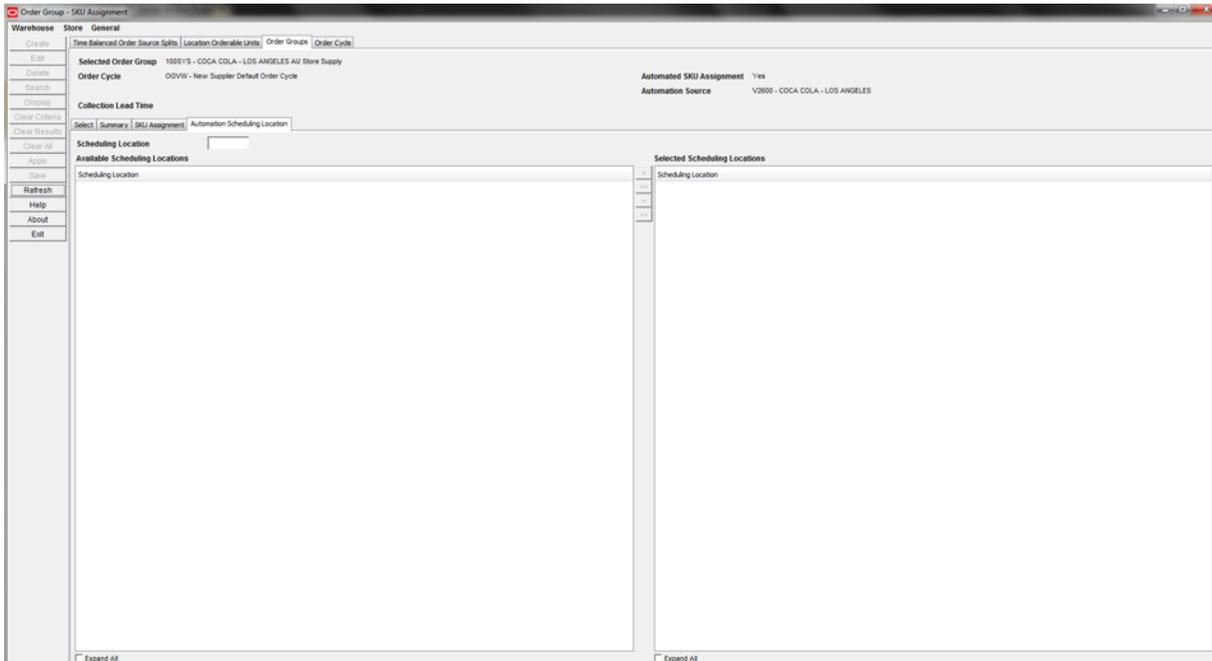
#### **Assign the Automation Scheduling Location to an Order Group**

**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 5–10 Automation Scheduling Location Tab**




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**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**.

## 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 5–11 Order Cycle Tab**

The screenshot shows the 'Order Group - SKU Assignment' window with the 'Order Cycle' tab selected. The window has a menu bar with 'Warehouse', 'Store', and 'General'. Below the menu bar are tabs for 'Time Balanced Order Source Splits', 'Location Orderable Units', 'Order Groups', and 'Order Cycle'. A vertical toolbar on the left contains buttons for 'Create', 'Edit', 'Delete', 'Search', 'Display', 'Clear Criteria', 'Clear Results', 'Clear All', 'Apply', 'Save', 'Refresh', 'Help', 'About', and 'Exit'. The main area is titled 'Select Order Cycle' and contains a list of order cycles: 'OGVW - New Supplier Default Order Cycle' and 'OGWW - New Supplier Whs to Whs Order Cycle'. Below the list, there are fields for 'Order Cycle Length' and 'Collection Lead Time'. A calendar grid shows the days of the week (Sun, Mon, Tue, Wed, Thu, Fri, Sat) and the numbers 1 through 7. The 'Order Cycle' field is currently empty.

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 5–12 Create Order Cycle Window**

The screenshot shows the 'Create Order Cycle' window. It has a title bar with 'Create Order Cycle' and a close button. The window contains the following fields:
 

- \* Order Cycle Code: A text input field.
- \* Order Cycle Name: A text input field.
- \* Order Cycle Length: A dropdown menu with '7' selected.
- Collection Lead Time: A text input field.
- A calendar grid showing the days of the week (Sun, Mon, Tue, Wed, Thu, Fri, Sat) and the numbers 1 through 7.
- \* Order Cycle: A text input field.

 At the bottom right, there are 'Save' and 'Cancel' buttons.

2. In the Order Cycle Code field, enter an ID for the order cycle.

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**Note:** Order cycle codes must consist of alphanumeric characters and must be unique.

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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**.

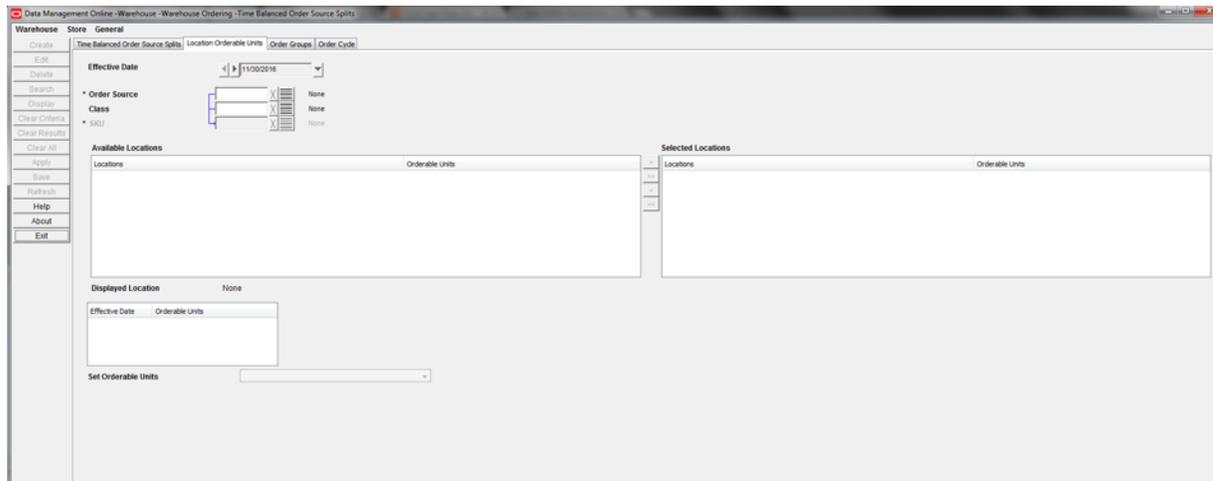
## Selecting the Default Orderable Unit for a Warehouse

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 5–13 Location Orderable Units Tab



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

Criteria	Description
Order Source	Enter the supplier ID or warehouse ID, or click the LOV button and select a warehouse.
Class	Enter the class ID, or click the LOV button and select a class.
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

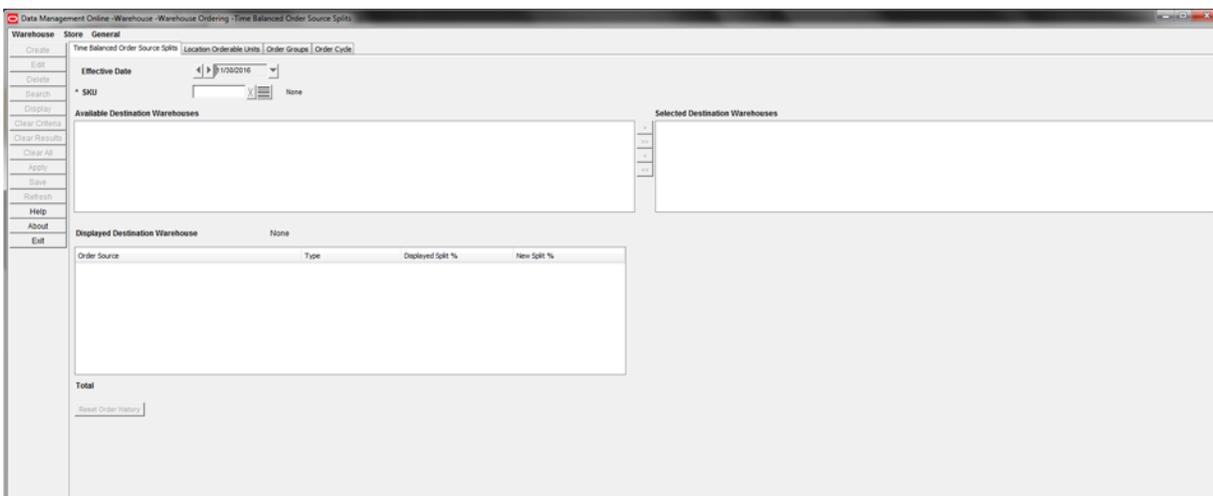
sources. DM online uses time balanced order source split to determine how orders are divided across sources.

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 5–14 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.

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**Note:** Once any value is entered into the New Split% column, **Reset Order History** is unavailable.

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

