

Oracle® Retail Allocation Cloud Service

Scheduled Allocations User Guide

Release 19.1.000

F31271-01

August 2020

F31271-01

Copyright © 2020, Oracle and/or its affiliates. All rights reserved.

Primary Author:

Contributing Author:

Contributor:

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this software or related documentation is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Value-Added Reseller (VAR) Language

Oracle Retail VAR Applications

The following restrictions and provisions only apply to the programs referred to in this section and licensed to you. You acknowledge that the programs may contain third party software (VAR applications) licensed to Oracle. Depending upon your product and its version number, the VAR applications may include:

- (i) the **MicroStrategy** Components developed and licensed by MicroStrategy Services Corporation (MicroStrategy) of McLean, Virginia to Oracle and imbedded in the MicroStrategy for Oracle Retail Data Warehouse and MicroStrategy for Oracle Retail Planning & Optimization applications.
- (ii) the **Wavelink** component developed and licensed by Wavelink Corporation (Wavelink) of Kirkland, Washington, to Oracle and imbedded in Oracle Retail Mobile Store Inventory Management.
- (iii) the software component known as **Access Via**™ licensed by Access Via of Seattle, Washington, and imbedded in Oracle Retail Signs and Oracle Retail Labels and Tags.
- (iv) the software component known as **Adobe Flex**™ licensed by Adobe Systems Incorporated of San Jose, California, and imbedded in Oracle Retail Promotion Planning & Optimization application.

You acknowledge and confirm that Oracle grants you use of only the object code of the VAR Applications. Oracle will not deliver source code to the VAR Applications to you. Notwithstanding any other term or condition of the agreement and this ordering document, you shall not cause or permit alteration of any VAR

Applications. For purposes of this section, "alteration" refers to all alterations, translations, upgrades, enhancements, customizations or modifications of all or any portion of the VAR Applications including all reconfigurations, reassembly or reverse assembly, re-engineering or reverse engineering and recompilations or reverse compilations of the VAR Applications or any derivatives of the VAR Applications. You acknowledge that it shall be a breach of the agreement to utilize the relationship, and/or confidential information of the VAR Applications for purposes of competitive discovery.

The VAR Applications contain trade secrets of Oracle and Oracle's licensors and Customer shall not attempt, cause, or permit the alteration, decompilation, reverse engineering, disassembly or other reduction of the VAR Applications to a human perceivable form. Oracle reserves the right to replace, with functional equivalent software, any of the VAR Applications in future releases of the applicable program.

Contents

Send Us Your Comments	vii
Preface	ix
Audience	ix
Documentation Accessibility	ix
Customer Support	ix
Improved Process for Oracle Retail Documentation Corrections	x
Oracle Help Center (docs.oracle.com)	x
Conventions	x
 1 Scheduled Allocation Overview	
 2 Create Scheduled Allocation	
Select Items	2-2
Saving an Item Search	2-2
Adding Items to the Worksheet	2-3
Deleting Items from the Worksheet	2-3
 3 Create Schedule from a Worksheet	
Creating an Allocation from the Worksheet	3-1
Reviewing Item Information	3-1
Understanding the Item Window	3-2
Viewing the Item Retail Pricing	3-2
Release Date	3-3
Specifying the Calculation Multiple	3-3
Minimum Available Quantity	3-3
Threshold Percent	3-3
Select Locations	3-4
Adding Locations	3-4
Locations	3-6
Select Policies	3-6
Selecting a Policy	3-6
Selecting a Level	3-8
Allocating by Hierarchy	3-8
Allocating by User Selection	3-9

Setting Inventory Parameters.....	3-10
Selecting Rule Level On Hand	3-10
Selecting Include in Inventory	3-10
Include Inventory Dates.....	3-11
Selecting a Date Range	3-11
Selecting a Type.....	3-11
Set Quantity Limits	3-12
Schedule an Allocation	3-12

Send Us Your Comments

Oracle Retail Allocation Cloud Service Scheduled Allocations User Guide, Release 19.1.000

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

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

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

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the Online Documentation available on the Oracle Technology Network Web site. It contains the most current Documentation Library plus all documents revised or released recently.

Send your comments to us using the electronic mail address: retail-doc_us@oracle.com

Please give your name, address, electronic mail address, and telephone number (optional).

If you need assistance with Oracle software, then please contact your support representative or Oracle Support Services.

If you require training or instruction in using Oracle software, then please contact your Oracle local office and inquire about our Oracle University offerings. A list of Oracle offices is available on our Web site at <http://www.oracle.com>.

Preface

This document describes the Oracle Retail Allocation user interface. It provides step-by-step instructions to complete most tasks that can be performed through the user interface.

Audience

This document is for users and administrators of Oracle Retail Allocation. This includes merchandisers, buyers, business analysts, and administrative personnel.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL: <https://support.oracle.com>

When contacting Customer Support, please provide the following:

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

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.

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

<https://docs.oracle.com/en/industries/retail/index.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 Help Center (docs.oracle.com)

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

<https://docs.oracle.com/en/industries/retail/index.html>

(Data Model documents can be obtained through My Oracle Support.)

Conventions

The following text conventions are used in this document:

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

Scheduled Allocation Overview

Manually re-creating allocations that have the same criteria requires time. Oracle Retail Allocation allows users to define an allocation and schedule it to be automatically re-created on specific dates and time until the end date is met, warehouse stock is depleted, or threshold is met.

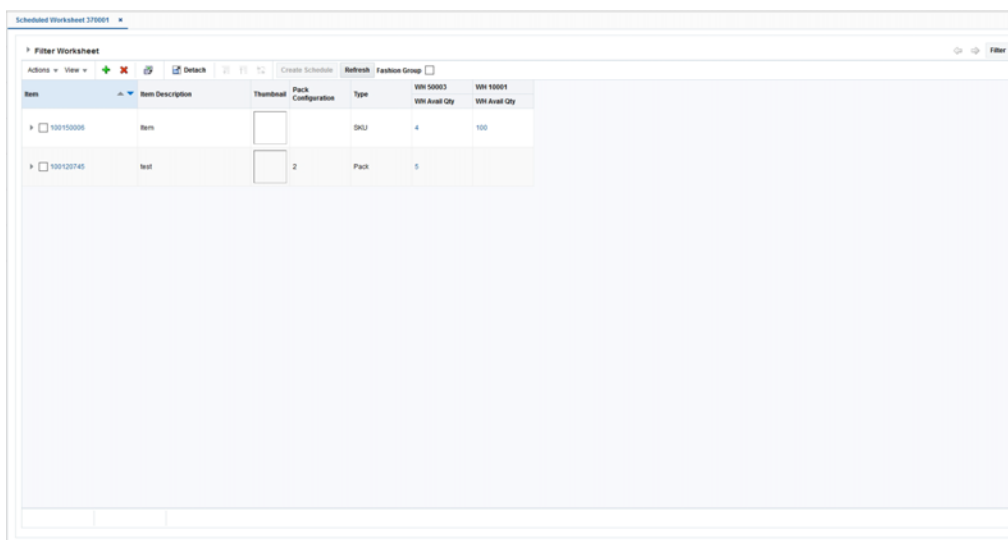
Create Scheduled Allocation

The Worksheet window allows you to view items that are selected for allocation, the quantity available, the item type, and source information. You can add or delete items from the worksheet.

You can review the items selected for the allocation in the Worksheet window. To create a worksheet:

1. From the **Tasks** menu, select **Create Scheduled Allocation**. The Create Scheduled Allocation window appears.
2. Search for the items that you want to add to the worksheet.
3. Select the required items from the search results. The **Create Worksheet** button is activated.
4. Click **Create Worksheet**. The Worksheet window appears with the selected items listed.

Figure 2–1 Scheduled Worksheet Window



5. Click the arrow next to **Filter Worksheet** to filter the worksheet based on the criteria available. You may filter the Worksheet based on the Warehouse, Inventory, or Pack.

Select Items

The Create Scheduled Allocation window allows you to search for and select items to allocate. The scheduled allocation is applicable only for item-source Warehouse.

To select items for a scheduled allocation:

1. From the Tasks menu, select **Create Scheduled Allocation**. The Create Scheduled Allocation window appears.

Figure 2–2 *Create Scheduled Allocation window*

Item ID	Item Name	Item Type
137450029	Item p1	Staple
137450061	Item P3	Staple
137450053	Item P2	Staple
130101854	Test 2	Staple
133300023	Item2	Staple
133300015	Item1	Staple
133500017	ItemA	Staple
121500010	TI	Staple
121500052	TI	Staple
137350010	test	Staple
137100045	TEST-SSSS	Staple
135500475	complex A - test 78927	Pack

2. In the Search section, enter the search criteria in the available fields. You must enter at least one item search criteria.
3. Click **Search** to view items that meet the criteria.

Note: To reset the search criteria, click **Reset** to refresh all fields.

4. Select the item that you want to include in the allocation.

Saving an Item Search

To save an item search:

1. From the **Tasks** menu, select **Create Scheduled Allocation**. The Create Scheduled Allocation window appears.
2. Enter the search criteria in the available fields.
3. Click **Save** to save the search criteria. The Create Saved Search window appears.
4. Enter a unique name in the **Name** field.

5. Select **Set as Default** if you want to set this search as the default search.
6. Select **Run Automatically** to run this search automatically every time the Create Standard Allocation window is opened.
7. Select **Save Results Layout** to save the column layout of the search result. This column layout is applied every time the saved search is run.
8. Click **OK** to save the item search.

Adding Items to the Worksheet

To add items to the worksheet:

1. On the Worksheet window, click the Quick Item Add icon. The item search fields are displayed in a pop-up window.
2. Search and retrieve the items that you want to add.
3. Select the items and click **Add to Worksheet**. The items are added to the current worksheet.

Deleting Items from the Worksheet

To delete items from the worksheet:

1. On the Worksheet window, select the items you want to delete.
2. Click the delete icon. The item is removed from the worksheet.

Create Schedule from a Worksheet

This chapter describes how you can create a scheduled allocation. To create a scheduled allocation, select and review the items, add locations, and assign policies. A Parent Allocation template is created. The template has all the criteria based on which the child or children allocations are scheduled or run.

Note: Scheduled Allocations are not intended to replace or replicate replenishment type of objectives.

Creating an Allocation from the Worksheet

To create an allocation from the Worksheet window:

1. On the Worksheet window, select the items that you want to allocate.
2. Click **Create Schedule**. The Allocation Maintenance window appears. You can proceed to select locations and policies for the allocation.

Reviewing Item Information

The Review section of the Allocation Maintenance window allows you to view items that were selected for allocation, the quantity available, the calculation multiple, and source information. Here you can specify the holdback quantity/percent.

To review item information:

1. On the Scheduled Worksheet window, click **Create Schedule**. The Allocation Maintenance window appears.

Figure 3–1 Allocation Maintenance Window

The screenshot shows the 'Allocation Maintenance' window for a 'Scheduled Allocation 100001'. It is divided into several sections:

- Summary:** Includes fields for Allocation Status (Scheduled), States (Not Calculated), Allocation Name (Item), Release Date, Context, and Comments.
- Locations:** Includes Group Type (Single Store), Group Value (1111), and checkboxes for 'Use Default Sourcing Location Only', 'Update Groups', and 'Valid Locations'.
- Policies:** Includes 'Apply Template' (Set All), 'Demand Source' (History), and 'Merchandise Level' (Item).
- Review:** A table with columns: Warehouse, Item, Item Description, Source ID, Source Type, Available Quantity, Backorder Quantity, Release Date, Target Stock Ratio, Calculation Multiple Value, Gross Need, Net Need, Final Allocated Quantity, Cumulative Quantity, Calculation Amount, Calculation Multiple, Minimum Available Quantity, and Threshold Percent.

The table contains three rows of data:

Warehouse	Item	Item Description	Source ID	Source Type	Available Quantity	Backorder Quantity	Release Date	Target Stock Ratio	Calculation Multiple Value	Gross Need	Net Need	Final Allocated Quantity	Cumulative Quantity	Calculation Amount	Calculation Multiple	Minimum Available Quantity	Threshold Percent
10001	100100005	Item		OH	100	0	1/1/2020		1.0						Each	30	10
50003	100100005	Item		OH	4	0	1/1/2020		1.0						Each	2	10
50003	100100745	test		OH	5	0	1/1/2020		1.0						Each	1	10

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

2. In the **Context** field, select a reason why the allocation is being created (optional).
3. If you select **Promotion** in the **Context** field, select a promotion in the **Promotion** field.
4. In the **Comments** field, enter comments or notes as necessary.

Understanding the Item Window

You can view the item details by clicking the Item ID link in the Worksheet or the Allocation Maintenance window. It has the following tabs:

- **Header** – This provides the complete item description along with the Merchandise Hierarchy, Differentiators and Supplier details
- **Pricing** – The Current Retail and Future Retail (based on the Release Date) values are displayed here at the unit level as well as the total number of allocated units
- **UDAs** – This displays any user defined attributes linked with the item in Merchandising
- **Config** – Packaging details linked with the item such as the inner, case and pallet values are displayed here.

This pop up also displays an image of the item retrieved from the ITEM_IMAGE table in Merchandising.

Viewing the Item Retail Pricing

In the **Item ID** column click the item ID for which you want to view the item details. The Item window appears. Select the **Pricing** tab to view the item retail information.

Note: The Pricing tab is not available for Non Sellable items.

Figure 3–2 Item Window

Item : 138050465 138050431 Style 2 Diff 2:Auto Green:Auto Large

Header	Pricing	UDAs	Config
Current Unit Retail USD 11.11			
Future Unit Retail (Sep 2, 2015) USD 11.11			
Current Total Retail USD 11.11			
Future Total Retail (Sep 2, 2015) USD 11.11			

OK

Release Date

For scheduled allocations, the release date field is not applicable. So the release date field is disabled.

Specifying the Calculation Multiple

Select the calculation multiple from the **Calculation Multiple** column. Click **Set All** to apply the multiple to all items in the allocation. The options available are:

- Each
- Inner
- Case
- Pallet

To specify the calculation multiple of individual items, select the multiple from the **Calculation Multiple** field next to the item.

Minimum Available Quantity

Specify the minimum available quantity the item must meet for scheduled allocations. This is to ensure that there is enough available quantity to fulfill total store demand or need (accounts for Hold Back values as well). Allocation auto creates an allocation even if the Minimum Available Quantity is not met. However, such allocations remain only in Worksheet Status.

Note: If you want to specify the minimum available quantity for all the selected items, then specify the quantity in the Minimum Available Quantity field appearing as a horizontal row, and click **Set All**.

If you want to specify different minimum available quantity for different items, then enter the value in the column next to the selected item.

Threshold Percent

Specify the threshold percent the item must meet for scheduled allocations.

Threshold percent is the acceptable tolerance amount between total store/warehouse need or demand, and total available quantity. When total store/warehouse need is greater than total available quantity, the threshold percent is used to prevent the system from spreading the total available quantity too thin. The allocation is auto created but not auto approved or reserved so you must determine if the allocated quantity is acceptable.

Note: If you want to specify the threshold percent for all the selected items, specify the quantity in the **Threshold Percent** field appearing as a horizontal row, and click **Set All**.

If you want to specify different threshold percentages for different items, enter the value in the column next to the selected item.

The Threshold Percent is the percent difference between *total store/warehouse need* and *total available quantity*. The Store/Warehouse Need can be Gross Need or Net Need.

- For Gross Need, Threshold Percent = ((Gross Need - Available Quantity)/Net Need) * 100%
- For Net Need, Threshold Percent = ((Net Need - Available Quantity)/Net Need) * 100% [Net Need = Gross Need - (Stock On Hand + Future Fulfillment)]

The Total Net Need and Available Quantity used for calculating the Threshold Percent are shown when you select these columns from the **View > Columns** menu in the Review section of the Allocation Maintenance window.

Select Locations

The Add Locations window allows you to choose the location or location groups that can be considered to receive items. By using the grouping tools in the merchandising system, Oracle Retail Allocation allows you to easily add location or location groups to an allocation. Every store group is customizable in Allocation.

You may create one of the following complex groups:

- A union, which includes all locations in the groups selected.
- An intersection, which includes all locations that are duplicated in the groups selected.
- An exclude intersection, which includes all locations that are not duplicated in the groups selected.
- An exclude, which excludes the locations in the groups selected.

Templates are created to apply the same location combination to multiple allocations.

Adding Locations

When you have selected and reviewed the items to allocate, you can select locations and assign stores to the Allocation.

Note: You can select franchise locations to create an allocation for franchise stores. Allocations can be for only franchise stores or for a combination of franchise and company stores. When an allocation created for one or more franchise stores is approved, a franchise order is created.

To add locations:

1. On the Allocation Maintenance window, from the Locations section, select the type of group in the **Group Type** field. Locations are brought from the selected group into the Allocation.
2. Clear the **Use Default Sourcing Location Only** check box to allocate to any store from any warehouse.
3. Select **Never** for the **Update Group** option to specify that location groups in this allocation should not be updated even if the Merchandising location groups (or the Allocation Group) change.
4. Click **Edit Location**. The Add Locations window appears.

Figure 3–3 Add Locations Window

5. Select the location group using the following lists:

- Location List
- Location Trait
- Allocation Group
- Store Grade List
- Single Store
- Single Warehouse

You can also select the **All Stores** and **All Warehouses** option.

6. Click the  icon. The location groups matching the search criteria are displayed in the **Group View** tab.
7. If you want to delete any stores before creating the location group, do the following:
 - a. Select the **Location View** tab. The stores available in the selected location groups are displayed.
 - b. Select the stores or warehouses you want to delete.
 - c. Click the delete icon.
8. Select the groups you want to combine to form a new location group.

9. Click the **Union**, **Intersection**, **Exclude**, or **Exclude Intersection** button to form the desired combination.
10. Optionally, enter a name in the **Group Name** field and click **Save As** to save the new location group.
11. Click **Apply**. The new location group is applied to the Allocation. You can review the selected locations in the Review section of the Allocation Maintenance window.

Locations

To review the locations added to the allocation:

1. On the Allocation Maintenance window, from the Review section, select the **Locations** tab. The **Locations** table appears.

Figure 3–4 Allocation Maintenance Window - Locations Tab

The screenshot displays the 'Allocation Maintenance' window for 'Scheduled Allocation 100001'. The 'Locations' tab is selected under the 'Review' section. The window is divided into three main panels: Summary, Locations, and Policies.

- Summary Panel:** Contains fields for 'Allocation Name' (Item), 'Release Date' (calendar icon), 'Context' (dropdown), and 'Comments' (text area).
- Locations Panel:** Contains a 'Locations' table with columns 'Group/Location', 'Description', and 'In Location Date'. A 'Set All' button is visible. Below the table, there are checkboxes for 'Use Default Sourcing Location Only' and 'Update Groups', and a 'Valid Locations' dropdown.
- Policies Panel:** Contains a 'Policies' table with columns 'Apply Template', 'Demand Source', and 'Merchandise Level'. A 'Set All' button is visible.

At the bottom of the window, there are buttons for 'Save', 'Schedule Frequency', and 'Cancel'.

Select Policies

An allocation determines need by using a policy and policy modifiers. You determine how the policy gathers information by selecting Level, Calculation Type, Date Range, and Sales History Type.

You can customize the level a policy is applied to by using the User Merchandise Level Selection window. Use the window to set the percentage of policies to apply to hierarchies and the time periods to constrain the policies.

Selecting a Policy

To select a policy:

1. From the Worksheet, select the items to allocate.
2. Click **Create Allocation**. The Allocation Maintenance window appears.

Figure 3–5 Allocation Maintenance Window

- 3. In the Rules section, you can select a predefined policy from the **Apply Policy** list.
- 4. Click **Edit** link in the Rules section. The Policies window appears.

Figure 3–6 Policies Window

- 5. In the Demand Source field, select the source of demand from the list of values:

Note: Before selecting the source of demand, understand the following:

- History for a warehouse is only applicable at the item level.
 - Plan re-project is not applicable for warehouses.
 - For the policy types which are based on database values/entries such as History, Forecast, Plan, Corporate and Receipt Plan, in case of no records existing at the warehouse level, their need is treated as zero in the same way as it works for store locations.
-

Table 3–1 Select Demand Source Options

Source	Description
History	Use the item's historical sales for the date range selected to determine the gross need of item on the allocation.
Corporate Rules	Use custom pre-defined rules to determine the gross need of the item on the allocation.
Manual	Use to allocate fixed quantities of the item on an allocation. You must know the quantity to be allocated to each store which must be manually entered.
History and Plan	Use both the item's sales history and plan for the date range selected to determine the gross need of the item on the allocation.
Forecast	Use the item's forecast for the date range selected to determine the gross need of item on the allocation.
Plan	Use the item's plan for the date range selected to determine the gross need of the item on the allocation.
Receipt Plan	Use the item's receipt plan to determine the gross need of the item in the Allocation system in order to create pre-allocations.
Plan Re-project	Use to compare the item's actual sales to the plan, re-forecast the plan based on performance for the date range selected, and use the re-projected plan to determine the gross need of the item on the allocation.

6. In the Sales History Type section, select the check boxes for the type of history to include.

Selecting a Level

On the Policies window, you can select to allocate by hierarchy or user selection.

Allocating by Hierarchy

To allocate using hierarchy:

1. In the Level section, select **Hierarchy**.

Note: Pack Distribution mode is not applicable for Item hierarchy. If the component items have more than one distinct department/class/subclass then User Selection must be used.

2. Select the hierarchy level to allocate by from the list.

Note:

- Item need for an allocation is determined by calculating the need for each item on the allocation from the selected rule for the organizational hierarchy level selected.
-

Allocating by User Selection

To allocate using user selection:

1. In the Level section, select **User Selection**.
2. Click **Edit**. The User Selection window appears.

Figure 3–7 User Selection Window

3. In the Date Range Editing section select an option:
 - Weight Percentage
 - Weight Percentage and Start and End Date
 - Weight Percentage and Weeks from Today
4. In the User Selection section enter an ID in the appropriate field to select a merchandise hierarchy level.
5. Click **Add**. The merchandise hierarchy is added to the Select Merchandise Hierarchy Items section.
6. Enter the weight or percentage to adjust the need calculated for the user selection in the **Weight** column.

7. Enter the start and end date in the **Start Date** and **End Date** column.

Note:

- The Start Date and End Date columns appear only if you have selected **Weight Percentage and Start and End Date** option.
 - You need to select two start and end dates when the demand source is **History**, **Forecast**, or **Plan**.
-

8. Enter a number in the **Weeks From Today** column. This value specifies the number of weeks all approved allocations, direct to store orders, and transfers as stock on hand and future fulfillment, are included at the store or warehouse in the need calculation. The value can range between 1 and 52 only.

Note:

- The **Weeks From Today** columns appear only if you have selected **Weight Percentage and Weeks from Today** option.
 - If no number is entered, the system includes all stock on hand at the store and future inventory regardless of the date on the purchase orders or transfers.
-

Setting Inventory Parameters

The inventory parameters comprise of Rule Level On Hand, Include In Inventory, and Include Inventory Dates.

Selecting Rule Level On Hand

To set Rule Level On Hand:

1. Select one of the following options available in the **Rule Level On Hand** section:
 - Do Not Use
 - Snap Shot
 - Real Time

Note:

- When Rule Level On Hand is used with User Selection, the on-hands is based on the rule level of the like merchandise hierarchy selected.
 - For performance purposes, the Rule Level On Hand Snap Shot is stored in a database table which can be refreshed through a batch program to be run at your discretion.
-

Selecting Include in Inventory

Currently, when allocating the net need using either Stock on Hand (SOH) or Rule Level On Hand (RLOH), the values for on-hand is derived from using the summation of five Merchandising Inventory buckets. You can select to include or exclude one or more of these buckets.

To include inventory details:

1. Select from the following options in the **Include** section:
 - On Hand
 - On Order
 - In Transit
 - Inbound Allocation
 - Outbound Allocation (only for warehouse locations)
2. Select the **Clearance Stock** option to include clearance stock in the need calculation.

Include Inventory Dates

In the Include Inventory Dates section, when you enter a date in the On Order Commit Date field, all approved allocations, direct to store orders, and transfers dated on or before the date are included in the calculation of on-hand quantity.

When you enter the number of weeks, it is used to determine how many weeks into the future should be used to pull approved allocations, direct to store orders, and transfers into the calculation for on-hand quantity.

Selecting a Date Range

On the Policies window, you can select the date range.

Start/End Week Ending Dates

1. Enter the start date in the **1st Period Start** field.
2. Enter the end date in the **1st Period End** field.

Note: You may select a second time period by entering dates in the **2nd period Start** and **End** fields.

Weeks From Today

Enter the number of weeks to search back or forward, depending on the rule type selected. The system starts searching with the last completed week.

Change Weights

1. Click **Change Weights**. The Change Weights window appears.

Note: The date displayed is the end of the week selected as defined in the allocation configuration files.

2. Enter the new weights as appropriate.
3. Click **OK** to save changes.

Selecting a Type

To select a type:

1. In the Type section **Need is** field, select how the Allocation should determine the quantity of items sent to a location.

2. In the **Mode** field, select the type of algorithm calculation.
3. In the **Allocate To** field, select the need type for calculation, values available are **Net** and **Gross**.

Set Quantity Limits

The quantity limits section allows you to set parameters for the allocation at the item/location level. The section allows you to set the parameters for different stages of the allocation.

To set quantity limits:

1. On the Allocation Maintenance window, select the **Quantity Limits** tab from the Review section. The Quantity Limits window appears.

Figure 3–8 Allocation Maintenance - Quantity Limits Window

- In the **By Location Aggregate** field, the location level is set to **Store** for Simple mode.
2. Select **Include Inventory Minimum** or **Include Inventory Maximum** to include stock on hand of the item at the location to calculate the net need.

Note: The **Include Inventory Minimum** and **Include Inventory Maximum** check boxes are selected by default.

3. Enter the quantity limits at the appropriate intersection for item/location and limiter.

Schedule an Allocation

To schedule an allocation:

1. On the Allocation Maintenance window, click **Schedule Frequency**. The Schedule Frequency window appears.

Figure 3–9 Schedule Frequency Window

2. Select an action in the **Action** field.
3. Enter the start and end dates in the **Start Date** and **End Date**.

Note: Scheduled allocations are only created if the frequency defined falls on or between the start and end dates. Scheduling allocations also depends on batch run time.

4. Select either **Weekly** or **BiWeekly** depending on when the scheduled allocation has to be run again.
5. Select the day of the week on which the scheduled allocation is created.

Note: You can select more than one day in a week. Allocation can be scheduled to run twice a week, thrice a week, and so forth.

6. The **Auto Schedule Last Modified Date** is the system generated date/timestamp, which displays the last date/timestamp of when the Auto-Schedule criteria was last modified. This field is non-editable.
7. Click **Apply**.

