

# Oracle® Retail Inventory Planning Optimization Cloud Service-Demand Forecasting / Inventory Planning Optimization Cloud Service-Lifecycle Allocation and Replenishment User Guide



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# Preface

The Oracle Retail Inventory Planning Optimization Cloud Service-Demand Forecasting/ Inventory Planning Optimization Cloud Service-Lifecycle Allocation and Replenishment User Guide describes the IPOCS-Demand Forecasting and IPOCS-Lifecycle Allocation and Replenishment module's user interfaces and how to navigate through each module.

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# 1

## Introduction: Demand Forecasting

Oracle Retail Inventory Planning Optimization Cloud Service-Demand Forecasting (IPOCS-Demand Forecasting) provides accurate forecasts that enable retailers to coordinate demand-driven outcomes that deliver connected customer interactions. With a single view of demand, IPOCS-Demand Forecasting provides pervasive value across retail processes, including driving optimal strategies in planning, increasing inventory productivity in supply chains, decreasing operational costs and driving customer satisfaction from engagement to sale to fulfillment. IPOCS-Demand Forecasting is a comprehensive solution that maximizes the forecast accuracy for the entire product lifecycle, the ability to adapt to recent trends, seasonality, out-of-stocks and promotions, and reflect the unique demand drivers of each retailer. Today's progressive retail organizations know that store-level demand drives the supply chain. The ability to forecast consumer demand productively and accurately is vital to a retailer's success. The business requirements for consumer responsiveness mandate a forecasting system that more accurately forecasts at the point of sale, handles difficult demand patterns, forecasts promotions and other causal events, processes large numbers of forecasts, and minimizes the cost of human and computer resources. Forecasting drives the business tasks of planning, replenishment, purchasing, and allocation. As forecasts become more accurate, businesses run more efficiently by buying the right inventory at the right time. This ultimately lowers inventory levels, improves safety stock requirements, improves customer service, and increases the company's profitability.

This guide contains these chapters and appendices for the IPOCS-Demand Forecasting module:

- [Demand Forecasting Dashboard](#)
- [New Item & Locations Task](#)
- [Forecast Setup Task](#)
- [Forecast Review Task](#)
- [IPOCS-Demand Forecasting Administration Task](#)
- [Business Rule Engine](#)
- [Offer Analysis Task](#)
- [Appendix: Forecast Approval Exceptions](#)
- [Appendix: Forecast Errors in the Forecast Scorecard Dashboard](#)
- [Appendix: Business Rule Engine](#)
- [Appendix: Troubleshooting](#)

## Forecasting Challenges and IPOCS-Demand Forecasting Solutions

A number of challenges affect the ability of forecast demand accurately including:

- [Selecting the Best Forecasting Method](#)
- [Overcoming Data Sparsity Through Escalation and Pooling Levels](#)



- [Forecasting Demand for New Products and Locations](#)
- [Managing Forecasting Results Through Automated Exception Reporting](#)
- [Incorporating the Effects of Promotions and Other Event-Based Challenges on Demand](#)
- [53 Week Calendar](#)

## Selecting the Best Forecasting Method

One challenge to accurate forecasting is the selection of the best model to account for level, trending, seasonal, and spiky demand. Oracle Retail's automatic evaluation of several methods eliminates this complexity. The automated approach can pick the best fit method among a large selection, like Simple Exponential Smoothing, Holt Exponential Smoothing, Additive and Multiplicative Winters Exponential Smoothing, Croston's Intermittent Demand Model, and Seasonal Regression forecasting.

Another approach is to combine the output of the competing methods to create a more robust forecast and minimize the risk of overfitting.

## Overcoming Data Sparsity Through Escalation and Pooling Levels

Demand at low levels, such as item/store, is usually too noisy to identify clear selling patterns, both for baseline and promotional sales. In such cases, generating a reliable forecast requires analyzing historical data at a higher level (escalation or pooling levels) in the hierarchy in which demand patterns can be consistently detected. The forecasting components estimated at these high levels, like seasonality curves and promotion effects, are combined with low level information, like base demand and trend, to create the low level forecast that is needed to drive the supply chain.

## Forecasting Demand for New Products and Locations

IPOCS-Demand Forecasting also forecasts demand for new products and locations for which no sales history exists. There are several options for new products. First, there is the option to go on auto mode, and the user does not have to do anything. Another option is model the new product's demand based on that of an existing similar product for which you do have a history. The existing item selection can be automatically done by matching item attributes. There is also the option to manually select the item. Forecasts for the new products are copied from one item or can be a combination of multiple items. The level for the new products are copied from Like Item, the seasonal curve, and the promotional effects are from escalation.

## Managing Forecasting Results Through Automated Exception Reporting

The IPOCS-Demand Forecasting end user is typically responsible for managing the forecast results for thousands of items, at hundreds of stores, across many weeks at a time. The Oracle Retail Predictive Application Server Cloud Edition (RPASCE) platform provides users with an automated exception reporting process that indicates to you where a forecast value may lie above or below an established threshold, thereby reducing the level of interaction needed from you. The framework for exception management is implemented using multiple features.

First, there are the approval exceptions, where the forecasts are run through business rules to determine if forecasts need review. For the forecasts that need review, a second layer of exceptions is available, to determine the priority in which the review should happen. This is implemented using the rules in the Business Rules Engine. In the exception dashboard profile, a user can filter down to different levels of merchandise/locations to view a hit count and the variance from the desired value of the forecast. She can then go to the Navigation exceptions

tiles and launch in a workspace where she can review the exceptions sorted in order of priority as defined by business rules.

In the exception dashboard profile, the user can filter down to different levels of merchandise/locations to view a hit count and the variance from the desired value of the forecast. The user then goes to the Navigation exceptions tiles and launches in a workspace to review the exceptions sorted in order of priority as defined by business rules.

Once in the workspace, the user navigates to flagged positions using the workspace alerts which are synchronized with the exception dashboards. When an exception is resolved, the result is committed to the domain, and the dashboard exception count— upon refresh—reflects the change.

## Incorporating the Effects of Promotions and Other Event-Based Challenges on Demand

Promotions, non-regular holidays, and other causal events create another significant challenge to accurate forecasting. Promotions such as advertised sales and free gifts with purchase might have a significant impact on a product's sales history, as can fluctuating holidays such as Easter. The causal forecasting functionality estimates the effects that such events have on demand. The results are used to predict future sales when conditions in the selling environment are similar. This type of advanced forecasting identifies the behavioral relationship of the variable you want to forecast (sales) to both its own past and explanatory variables such as promotion and advertising. Suppose that your company has a large promotional event during the Back To School season each year. The exact date of Back To School varies from year to year; as a result, the standard time-series forecasting model often has difficulty representing this effect in the seasonal profile. The Promotional Forecasting module allows you to identify the Back To School season in all years of your sales history, and then define the upcoming Back To School date. By doing so, you can causally forecast the Back To School-related demand pattern shift.

## 53 Week Calendar

For the majority of retailers, the business is managed using a calendar (364 days organized into 13 week quarters) that periodically includes an extra 53rd week so that the year end stays in about the same time of the year. It is useful to have some control over how this 53rd week will be managed within the forecasting system's time dimension. Management of this issue causes customers the pain, time and cost of configuring their data every few years that this happens.

The problem described has two implications. The first case is when two years—each with 52 weeks—of historical sales are available, and the retailer needs to forecast for the following year, which has 53 weeks. In this case, the retailer needs to have a forecast for that period, but also preserving the seasonality for the other periods. The second case is when one of the years of historical sales has 52 weeks, and the other has 53 weeks. In this case, the retailer needs to have a forecast where the 53 week history is mapped to 52 seasonality indices. There is a third case, when the 53rd week is outside the dates considered for the forecast generation. If this is the case, nothing needs to be done.

There is no special setup for handling the 53rd week. It is only the calendar file that has 53 fiscal weeks in one of the years. If the 53rd week is in history, the value for that week is not taken into account when calculating time-phased metrics. Specifically for seasonality, the sales of the 53rd week are not used to calculate the 52 seasonal indices. However, for the base demand calculation, which does not have a time component, the value of the 53 week is used. If the 53rd week is in the forecast region, the seasonality for the upcoming 53rd week is the average of the week 52 and the first week of the following year.

# Forecasting Process

The forecasting process represents a next generation approach engineered to provide transparency, responsiveness and accuracy through the application of retail sciences using the scale of our modern Retail Cloud Platform.

- **Transparency** enables analytical processes and end-users to understand and engage with the forecast. This is accomplished by representing the demand model as the decomposition of intuitive components that include base rate of demand, seasonality and causal effects. The forecasting process provides transparency to the final results, individual model components and underlying decisions by the system and end-user.
- **Responsiveness** enables the coordination and simulation of demand-driven outcomes using forecasts that adapt immediately to new information and without a dependency on batch processes. This is accomplished by separating the calculation of the forecast from the analytical processes that determine components within the forecasting model.
- **Accuracy** enables retailers to deliver connected customer interactions while driving efficiencies to increase profits. Maximizing forecast accuracy is paramount to IPOCS-Demand Forecasting. This is accomplished through the application of best-fit sciences throughout the forecasting process.

The forecast engine powering IPOCS-Demand Forecasting is the same that powers all solutions in the Retail AI Foundation Cloud Service platform. The separation of the workflow in IPOCS-Demand Forecasting and the forecast engine, allows much more flexibility in evolving the two pieces separately.

## Process Summary

Following is a summary of the forecasting process:

### 1. Prepare Reference Data

The purpose of this step is to prepare reference data for subsequent estimation, pruning and escalation processes. The emphasis in the preparation processes is to treat anomalies in historical data, such as out-of-stock, outliers and promotions, where the objective is to increase reliability of the reference data.

### 2. Estimated Demand Parameters

The purpose of this step is to estimate all demand parameters and at all possible escalation levels. An escalation level represents a grouping of items and locations for robust parameter estimation to overcome sparsity and sensitivity. Escalation levels can be tied to explicit hierarchy levels (for example, subclass/region) or flexible item/location groupings (for example, optimized analytical clusters). As each demand parameter is estimated, multiple machine learning methods are applied, individually optimized and evaluated for accuracy. The final model can represent the best-fit method or a robust method calculated as an intelligent blending of multiple methods weighted by accuracy.

### 3. Prune

The purpose of this step is to prune escalation levels that do not pass analytical quality checks. These include data, estimation and correlation quality checks. The result is a candidate pool of high quality parameter estimates for the escalation process.

### 4. Escalate

The purpose of this step is to select the demand parameter estimate for each component of the forecast model using the candidate pool of escalation levels. The escalation process reflects the optimal balance of richness and reliability.

## 5. Forecast

The purpose of this step is to calculate the forecast through the application of demand parameter estimates from the analytical processes in conjunction with the known demand drivers and user-overrides. The demand model is completely responsive to changes in demand drivers and updates to the demand model itself (for example, user-defined override). This step also includes support for responsive new-item forecasting, with tailored approaches for new-item scenarios, such as dynamic, repeatable and similar assortments.

## User Experience and Workflow

The user experience is delivered on our experience-inspired RPAS Cloud Edition (RPASCE) user interface (UI). RPASCE provides end-users with a next generation cloud-native UI that is purpose-built to accelerate intent into action for planners and forecasters. This includes interactive and visual dashboards to assess priorities, responsive and flexible workspaces to implement decisions and a coordinated exceptions framework that ties business process all the way from dashboard to cell.

The business process is engineered to maximize the productivity of end-users through exception-driven processes and emphasis on workflow simplification. The day-in-the-life processes begin with dashboard views that enable the end-user to assess the effectiveness and quality of their forecasts and prioritize exceptions. From the dashboards, the end-user is able to contextually launch into the appropriate workspace. For exception-driven processes, the end-user is guided to the point-of-resolution, with visibility to progress and the ability to iteratively work through forecasting priorities throughout the day.

## Dashboard Views and Workspaces

The dashboard views and workspaces that support day-in-the-life forecasting workflows are summarized as follows:

- **Forecast Overview Dashboard**

This dashboard leads with Key Performance Indicators (KPIs) that provide macro-level insight into forecasting priorities and the effectiveness of the forecasts in driving demand-driven outcomes. This enables end-users to assess forecasting complexity drivers, such as frequent promotions, and forecasting performance towards business objectives, such as fill rates.

- **Forecast Scorecard Dashboard**

This dashboard provides insight to forecast accuracy (for example, MAPE, Bias) along with clear visibility to system performance and the impact of end-user contributions to the forecasting process. This enables forecast analysts and managers to identify forecast process improvement priorities.

- **Exception Dashboards**

The exception dashboards represent the primary starting point for day-in-the-life processes. The approval and navigation exceptions each have a dedicated dashboards that enables end-users to efficiently drive decisions through focused exception-driven processes. From here, end-users can define the scope of exceptions to be managed through dashboard filters and launch directly to workspace views tailored for resolution. As exceptions are resolved, the dashboard is updated to enable end-users to iteratively work through forecasting priorities.

- **Forecast Review Workspaces**

The forecast approval workspaces represent the primary point of interaction with the demand forecasts. The navigation exceptions and their workspace counterparts allow you

to review forecast information guided by priorities that are dynamically implemented in the Business Rule Engine. This is supported by a rich set of decision support metrics and the ability to responsively simulate forecast updates.

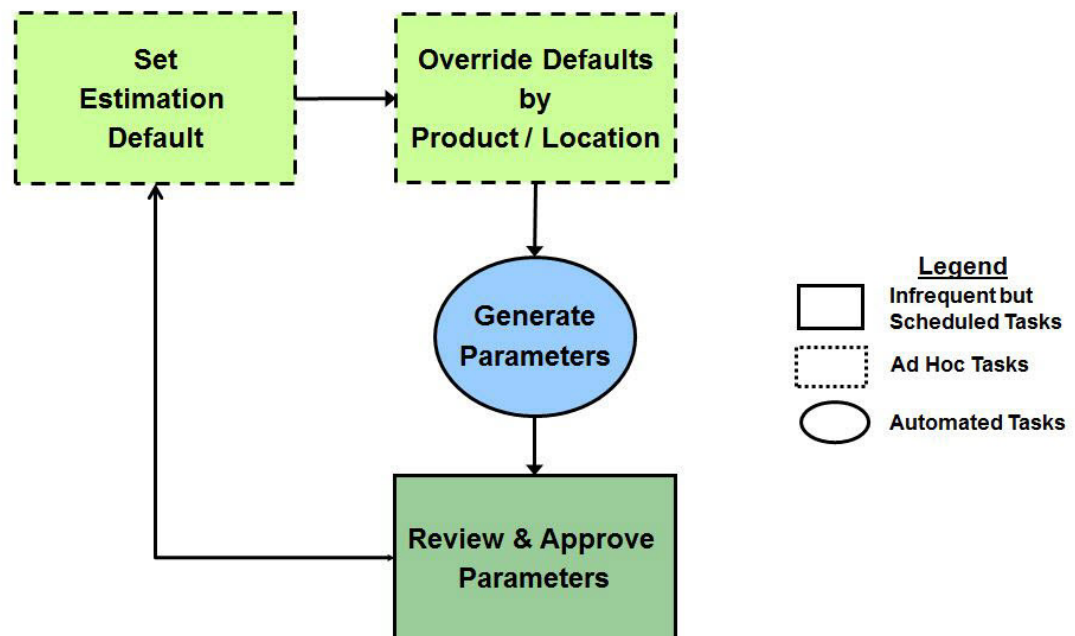
## Forecast Engine

Not visible to the end user is the forecast engine, and all the tasks happening behind the scenes. The forecast engine produces a single version of forecast that is used in IPOCS-Demand Forecasting, all Retail AI Foundation Cloud Service solutions, as well as planning and merchandising. The batch is split between estimation and forecasting. Estimation consists of the heavy data mining of historical demand to generate the necessary forecast parameters like seasonality, price and promo effects. Following are tasks which comprise the estimation workflow within the Retail AI Foundation Cloud Service.

Refer to the *Oracle Retail AI Foundation User Guide* for details on the methodology used for forecast generation.

Figure 1-1 IPOCS-Demand Forecasting Estimation

### IPOCS-Demand Forecasting: Estimation

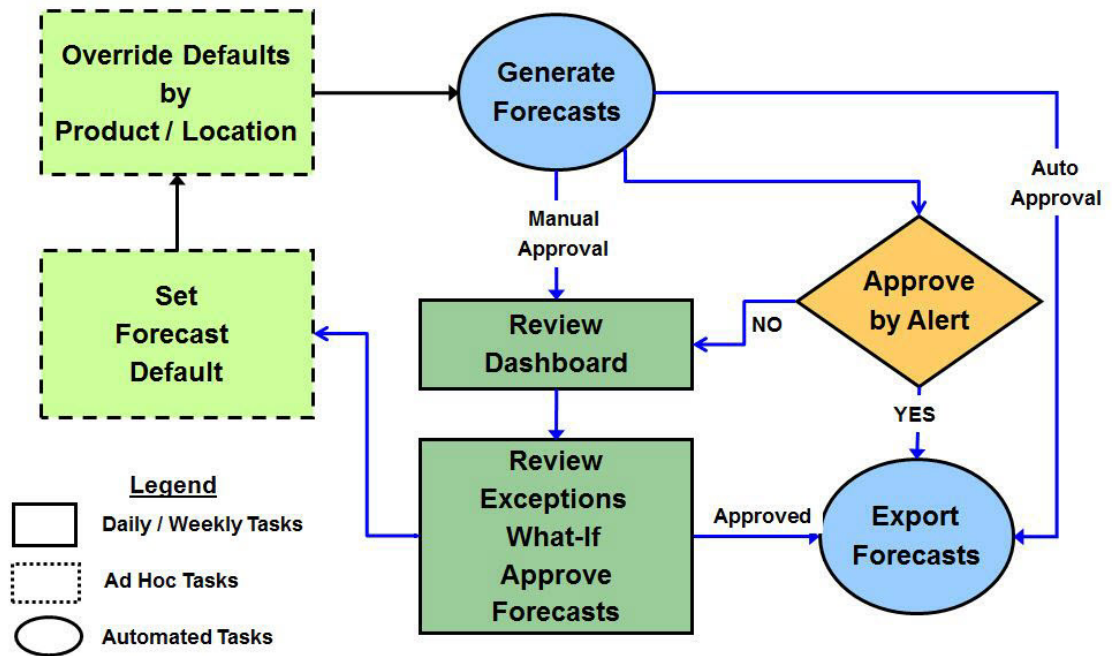


After estimation is run, the forecast parameters are computed, and everything is available to generate the forecast.

The forecast generation is happening in the forecast engine, while all the workflow-related activities are happening in the IPOCS-Demand Forecasting solution.

Figure 1-2 Forecasting for IPOCS-Demand Forecasting

## IPOCS-Demand Forecasting: Forecasting



# 2

## Demand Forecasting Dashboard

The IPOCS-Demand Forecasting Dashboard is the workspace that is seen upon login. You can use the dashboard to quickly analyze the health of the business. The dashboard will need to be refreshed periodically as new products, locations, and demand-related data are added. This typically happens weekly, but depends on your administrator's settings. The measure data of existing products and locations in the dashboard can be refreshed at any time to view updated changes.



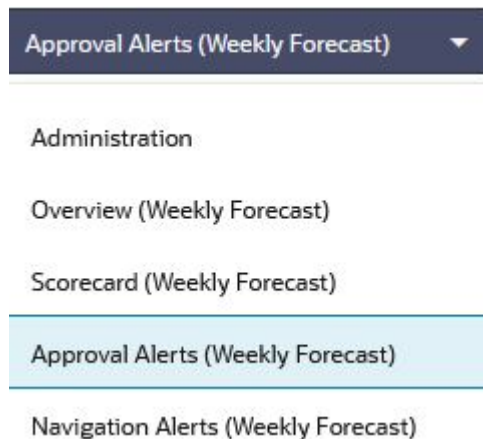
### Note:

For additional information about the user interface, dashboard, and workspaces, click **Application Help** from the Help icon on the dashboard.

IPOCS-Demand Forecasting has two dashboard profile types and includes two profiles for each type:

- Metric profile type
  - [Overview Dashboard](#)
  - [Forecast Scorecard Dashboard](#)
- Exception profile type
  - [Approval Alerts](#)
  - [Navigations Alerts](#)

**Figure 2-1 Dashboard Profiles**

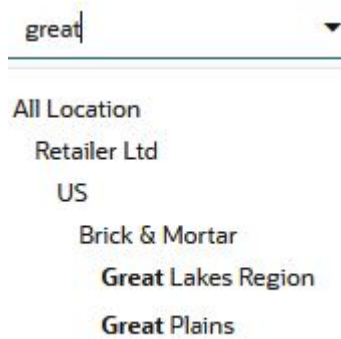


The information in the metric and exception profiles is summarized in tiles, which can be filtered on the product, location, or any other hierarchy that makes sense as shown in [Figure 2-2](#) and [Figure 2-3](#).

**Figure 2-2 Product Filter**



**Figure 2-3 Location Filter**



The information that is presented condensed in the tile metrics, is also presented in a chart with more detail.

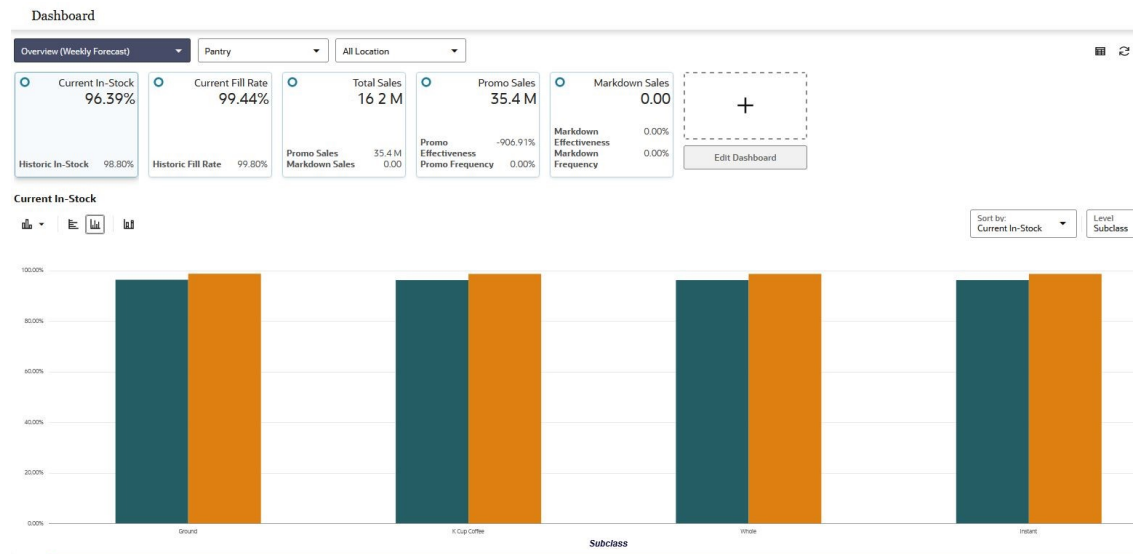
In addition there is the Administration dashboard which gives information about scheduled OAT tasks, or workspace build information. More about the Administration dashboard can be found in the *Oracle Retail Predictive Application Server Cloud Edition User Guide*.

## Overview Dashboard

There are five GA tiles in the Overview dashboard.



Figure 2-4 Overview Dashboard



**Note:**

This view has a dual Y-axis and the scales of the Y-axes could be different from each other.

**Current and Historical In-stock Rates**

The first tile displays information about how often stockouts occurred. If every four weeks, a stockout is registered, the in-stock rate would be 75%. This information is driven by how often stockouts occur. The tile displays current and historical fill rates.

The in-stock calculations are:

$$\text{In-stock\%} = (\text{total number of periods} - \text{periods with outage}) / \text{total number of periods}$$
 number of periods for the Current version of the metric: given by Current Period Window in Forecast Setup/Exception Management step  
 number of periods for Historic version of the metric: given by Historic Period Window in the Forecast Setup/Exception Management step.

**Stockouts**

The second tile displays information about the current and historical fill rates, which are related to service levels. This information is directly tied to the amount of lost sales caused by total or partial stockouts.

**Breakdown of Sales**

The third tile shows the breakdown of sales. The total sales are the sum of regular, promotional and markdown sales. The promotional and markdown sales are displayed as secondary metrics to gauge the amount of sales driven by these extraordinary events.

**Promotional and Markdown Sales**

The last two tiles display information about promotional and markdown sales. Besides the total units, additional information is displayed as secondary metrics. For instance, the tiles display

how often the merchandise are promoted or marked down, as the promo or markdown frequency. Also, it shows the effectiveness of how promoting or marking down merchandise is increasing demand as compared to regular demand.

The calculations for the Markdown Effectiveness and Frequency are:

Markdown Effectiveness = (sum of markdown units) / (sum of regular units)

Markdown Frequency = (number of periods with markdown sales) / (total number of periods)

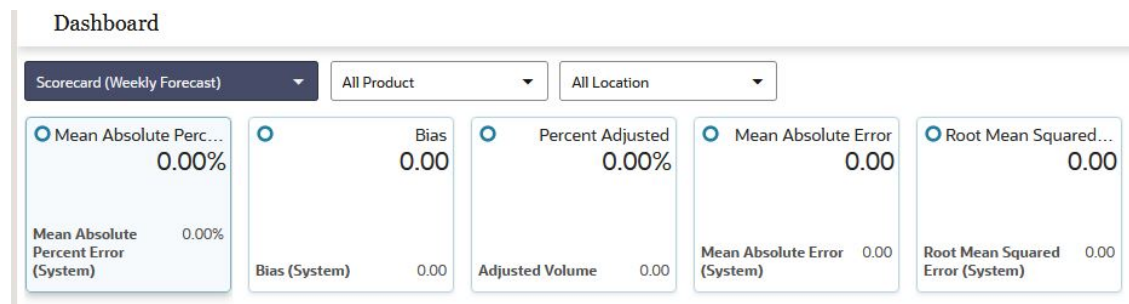
The number of periods used for these calculations is given by Recent Sales Window in Forecast Setup/Exception Management step.

It may seem a little confusing to introduce yet another time window, but if we are using just the current period window, all the periods may have markdown sales, which may not be a complete picture of the business. This is why markdown has its own controls.

## Forecast Scorecard Dashboard

The information displayed in this dashboard helps the forecast analyst or forecast manager determine how accurate the forecasts are.

**Figure 2-5 Forecast Scorecard Dashboard**



### Error Metrics

These are the error metrics:

- Mean Absolute Percentage Error
- Root Mean Squared Error
- Mean Absolute Error
- Forecast Bias
- Percent Adjusted

The error metrics are detailed in [Appendix: Forecast Errors in the Forecast Scorecard Dashboard](#). They are calculated for both the user-adjusted, as well as for the system-generated forecasts, allowing a fair evaluation of the performance of the analyst versus the system.

### Forecast Bias

Another tile is dedicated to the forecast bias, a useful metric in determining if the forecast is consistently over or under the actual demand.

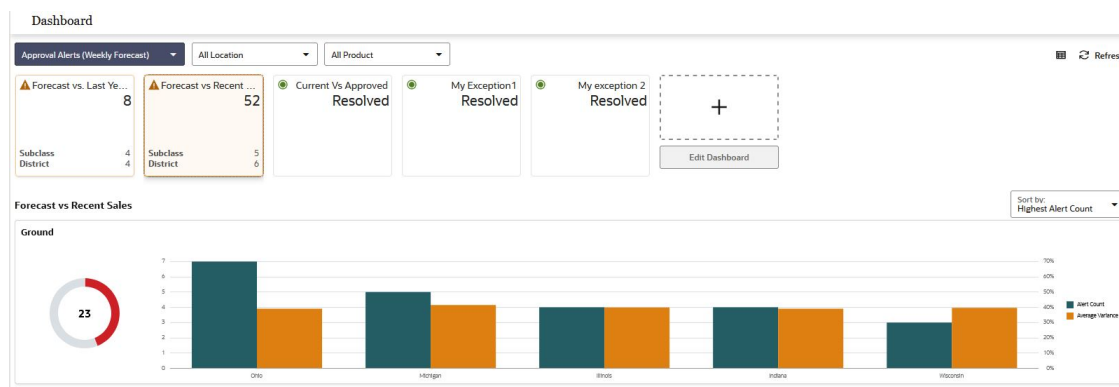
## Percent Adjusted and Adjusted Volume

Finally, there is the Percent Adjusted tile, with the Adjusted Volume as the secondary metric. Here is displayed the percent of adjusted forecasts, and the volume resulted as the result of the adjustments. For instance, if the percent adjustment is high, but the adjusted volume is not significant, the analyst may want to spent time and effort on other areas of the merchandise.

## Approval Alerts

This is the exception profile that shows the result of the approval business rules.

**Figure 2-6 Approval Exceptions**



## Exceptions

The information displayed in the tiles is based on exceptions, or business rules defined to check if the forecasts are within bounds with respect to some thresholds. The exceptions definitions and expressions are detailed in [Appendix: Forecast Approval Exceptions](#).

### Number of Hits Count

The main metric in the tiles is the number of hits count which is based on the product and location filter settings. If the filter settings range products and locations to a narrower selection than, *All Product* and *All Location*, then the number should be reflected in the tile; that is, it should decrease.

### Number of Subclass and Districts

The secondary metric on the tiles display the number of subclass and districts that are affected. Note that the dimensions are configurable.

### Charts

Each tile comes with a set of charts where the hit count information is broken down to lower levels and sorted based on hit count, or average variance.

**Note:**

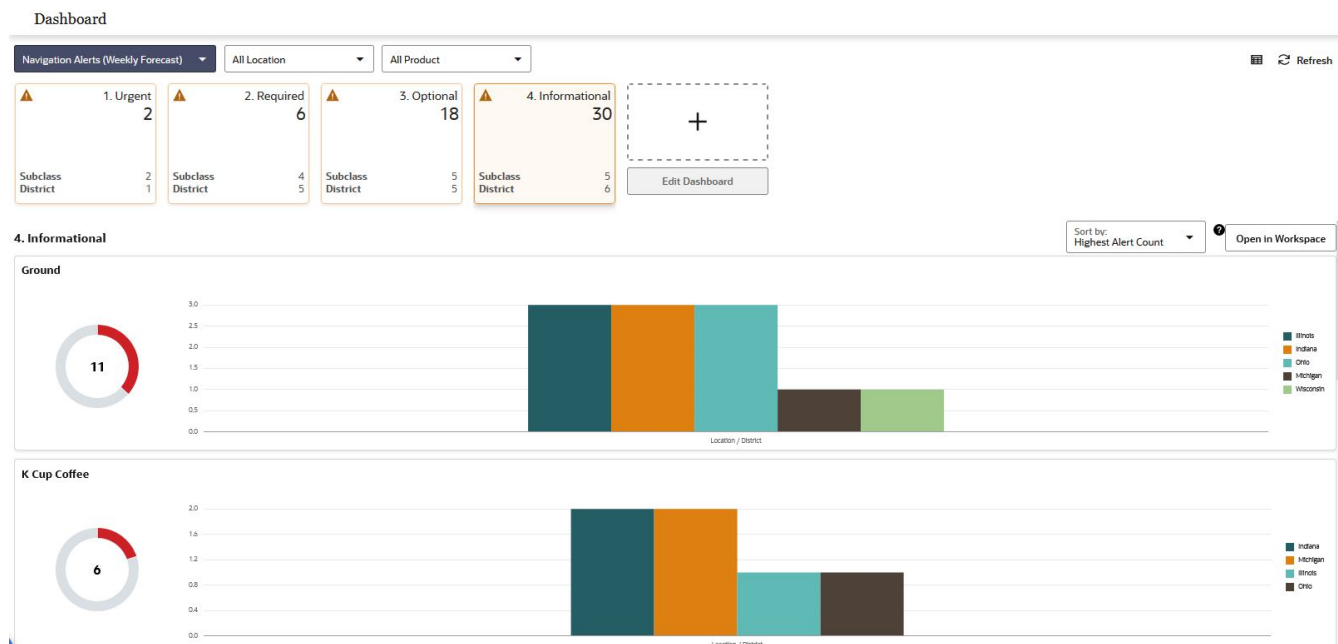
The average variance represents how much off the forecast is versus its target. For example we compare the forecast against last year sales. If the sales are 10 units and the forecast is 15 units, the variance is 5 units. The average variance is the average of all the differences between forecast and last year sales.

The hit count represents how many times the forecast did not pass the configured business rules. The average variance represents by how much the forecasts were off. This is useful, because if a subclass is heavily alerted, but the forecasts only barely miss the threshold, the user may want to concentrate on other merchandise, potentially less alerted, but where the forecasts were off by a larger amount.

## Navigations Alerts

The approval exceptions are very helpful in deciding what product/locations are approved and which ones need review. However, reviewing unapproved product/locations in order of critically, makes the reviewing process much more efficient. You can start reviewing Urgent items, then move on to Required, and if time permits you can review Optional and then Informational.

**Figure 2-7 Navigation Exceptions**



### Exceptions

The product/locations presented in this dashboard are virtually the same as the ones in the Approval Exceptions. The difference is that the product locations are sorted in order of priority, which is a proxy for the importance to the business. The rules to determine the priorities are set up in the Business Rule Engine, as detailed in the [Appendix: Business Rule Engine](#).

### Forecast Review Workspace

Finally, when a user makes a decision as to which merchandise and locations to review, the user can launch directly in the Forecast Review workspace by clicking **Open in Workspace**, with the locations and product ranged down to the desired selection. Once in the workspace, you can choose to use the navigation alerts to navigate to product/locations. Every navigation exception can have a workspace counterpart. Using these exceptions you are guided to the exact product, location, and time period that needs your attention.

The **Open in Workspace** button is located in the right corner above the top chart



**Note:**

Alternatively, you can right-click on any exception chart and select **Open in Workspace**

# 3

## New Item & Locations Task

This chapter describes the capabilities around forecasting New Items and New Stores. Forecast generation for New Items can be fully automated, while for New Stores the process is manual.

In general, an item is eligible to be considered new if it satisfies the following condition:

- Forecast start date override is in the future *or* Sales history length is less than the time series duration parameter

An item is eligible to be considered a Like Item if it satisfies these conditions:

- Its recent sales density needs to be larger than a threshold or zero for a special case.
- Its sales history needs to be longer than the time series duration parameter.
- Finally, we provide the Like Item exclusion mask measure, which can be populated by custom rules through which the implementer can include any other eligibility conditions.

Once a New Item is assigned a system recommended Like Item, it is not processed in the next New Item batch because it is considered already taken care of.

If you set up the New Item to do manual approve first, all the New Items in the system are handled as manual approval.

In general, if auto approval is turned on, and batch is ran, the items already processed will be skipped in the batch as we only look at *refresh New Item* in each batch.

These workspaces help you achieve this task:

- [New Item Maintenance Workspace](#)
- [New Store Maintenance Workspace](#)
- [New Item Management Workspace](#)

## New Item & Locations Workspaces, Steps, and Views

The following table lists the workspaces, steps, and views for the New Item & Locations task.

**Table 3-1 New Item & Locations Workspaces, Steps, and Views**

Workspace	Steps	Views
New Item Maintenance Workspace	New Item Settings Step	New Item Basic Parameters View
	Like Item - Select and Approve Step	New Item Forecast View New Item Statistics View Select and Approve View
New Store Maintenance Workspace	Like Store Assignment Step	Product Like Store Assignment View

Table 3-1 (Cont.) New Item & Locations Workspaces, Steps, and Views

Workspace	Steps	Views
New Item Management Workspace	Settings Step	New Item Basic Parameters View
	Manage Step	New Item Attributes View
		New Item Statistics View
		Select and Approve View New Item Forecast View
	View Step	Attribute Value View
Similarity Score View		

## New Item Maintenance Workspace

 **Note:**

There are two workspaces that can help you with setting up New Items for forecast generation:

- [New Item Maintenance Workspace](#)—Use when item attributes are not available and you need to manually select Like Items from the New Item Maintenance workspace.
- [New Item Management Workspace](#) —Use when item attributes are available, the Like Item selection can be automated using the New Item Management workspace.

It is recommended to use only one of the two workspace options, depending on whether or not attributes are available. The other workspace can be easily hidden using Access Rights.

The workflow in the New Item Maintenance workspace starts by selecting the New Items. An item is defined as new if it has a forecast startdate override that is in the future, that is later than the `RPAS_TODAY` date. The date can be loaded in the measure if available. If not, the date can be entered manually. Once you identified the New Item and the forecast startdate override is populated, you can select the substitution method. Depending on your selection, you may need to enter additional information. The workflow message measure guides you through the process. For instance, if you choose the Like Item option, you need to specify a Like Item. If you do not specify a Like Item, the workflow message warns you and displays **User Specified Like Item Not Set**. You have successfully set up a New Item for forecasting when the workflow message is cleared and the Approval flag is selected. You finish by running the Approve New Items custom menu.

 **Note:**

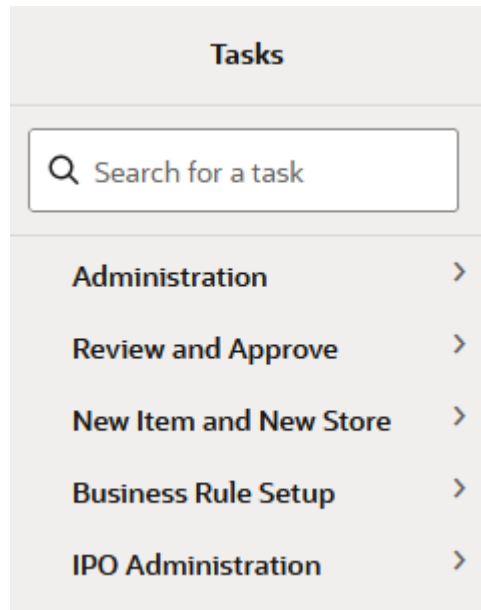
You can work on multiple New Items and run the custom menu after you have set them all up.

Another helpful tool in the process of setting up New Items is the Workflow Message Count measure. It displays the number of item/store combinations that have been flagged as new, but have not yet been successfully set up. If setting up the New Items was successful, then the measure displays a count of zero.

To build the New Item Maintenance workspace, perform these steps:

1. From the left sidebar menu, click the Task Module to view the available tasks.

**Figure 3-1 Task Module**

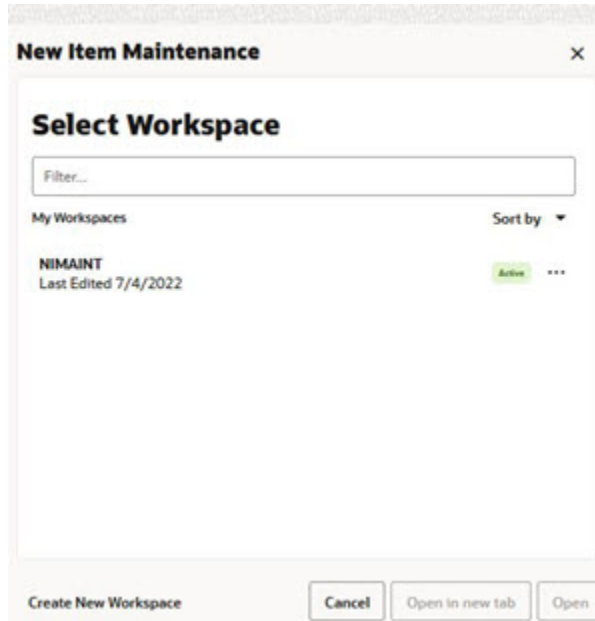


2. Click the **New Item/Store** activity to access the available workspaces.
3. Click **New Item Maintenance**. The New Item Maintenance wizard opens.

You can open an existing workspace, but to create a new workspace, click **Create New Workspace**.

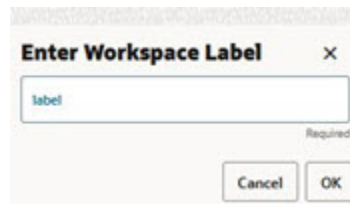


Figure 3-2 New Item Maintenance Wizard



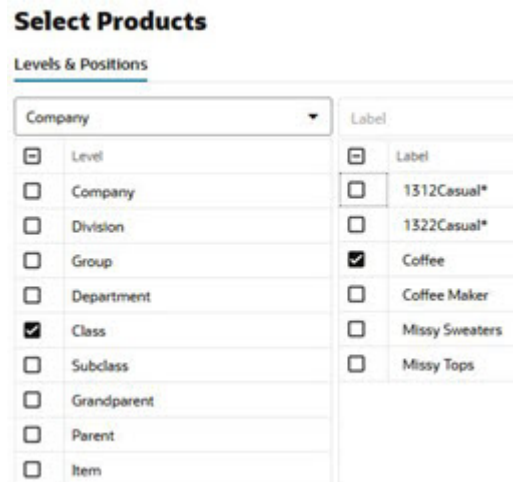
4. Enter a name for your new workspace in the label text box and click **OK**.

Figure 3-3 Enter Workspace Label



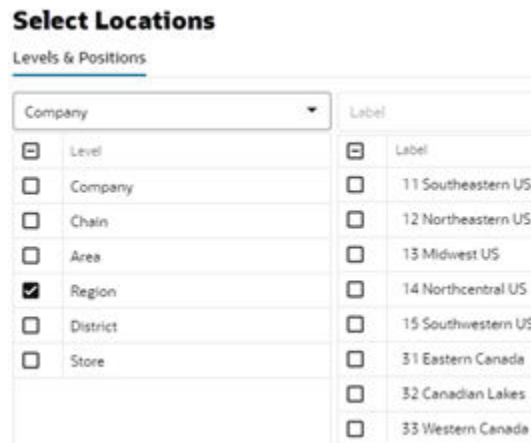
5. The Workspace wizard opens. Select the products you want to work with and click **Next**.

Figure 3-4 Workspace Wizard: Select Products



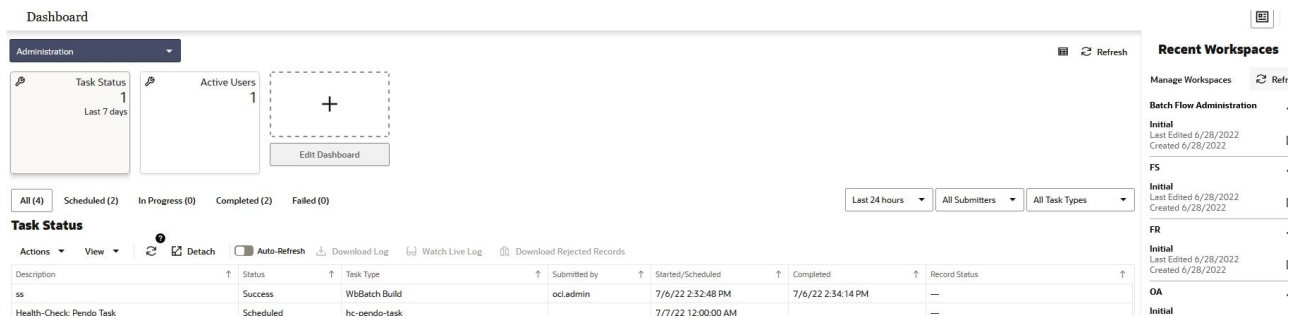
- Select the locations you want to work with and click **Finish**.

**Figure 3-5 Workspace Wizard: Select Locations**



- The wizard notifies you that your workspace is being prepared. Successful workspaces are available from the Dashboard.

**Figure 3-6 Successful Workspace Build**



## New Item Settings Step

This step contains the [New Item Basic Parameters View](#).

## New Item Basic Parameters View

The New Item Basic Parameters view allows you to set default values for some parameters related to the New Item functionality.

**Figure 3-7 New Item Basic Parameters View**

	Product	Coffee
Measure		↑
Adjustment Factor		0.95
Auto-Approve		<input type="checkbox"/>
Substitute Method		Base Rate of ▾
Threshold Recent Sales Density		0.50
History Time Series Duration		5

#### Measures: New Item Basic Parameters View

The New Item Basic Parameters view contains the following measures.

##### Adjustment Factor

The only demand component needed to generate forecast for New Items is base demand. If the Like Item substitution method is selected, the adjustment factor specifies what percent of a Like Item's base demand will be copied to the New Item.

##### Auto-approve

You decide if automatic Like Item recommendations are automatically approved by selecting this measure. If the automatic Like Item recommendations are not automatically approved, the system suggested Like Items are still displayed, but not used in forecast generation.

##### Substitute Method

This measure displays a list where you can select the substitute method. When a substitute method is used to forecast, the method set for an intersection is cleared once the Default Forecast Start Date is greater than the Forecast Start Date Override plus the Like TS Duration for the intersection. Valid substitute method options are:

- **None**

No forecast is created for the New Item.

- **Like Item**

The forecast is created using the base demand of a Like Item. The Like Item is selected in the User Selected Like Item measure in the Like Item - Select and Approve view. The forecast of the New Item is given by:

$$\text{Base demand New Item} = \text{base demand Like Item} * \text{Adjustment Factor}$$

Forecast at time t = base demand New Item \* seasonality at time t (coming from escalation level) \* promo and price effects (coming from pooling level)

- **Base Rate of Demand**

IPOCS-Demand Forecasting calculates the escalated base rate of demand. The forecast for the new item is given by::

*Forecast at time t = base rate of demand (coming from escalation level) \* seasonality at time t (coming from escalation level) \* promo and price effects (coming from pooling level)*

- **User Input**

This method is very similar to Base Rate of Demand, with the difference that you have to manually specify a base rate of demand. The forecast is then generated using the same formula as for Base Rate of Demand.

### **Threshold Recent Sales Density**

In this measure, you enter the threshold for the data density. If the actual density is larger than the threshold, the time series qualifies to serve as Like Item/location for a new/item/location. The data density is calculated as:

*data density = number of periods with demand larger than zero / total length of demand*

For a time series with the following demand values:

0,1,0,1,0,today

The data density is  $2/4 = 50\%$

### **History Time Series Duration**

In this measure you can enter the threshold for the historical demand duration to determine if a time series is considered. If the demand history is less than the threshold, the forecast of the new time series is generated using the New Item/store functionality. If the demand length is larger than the threshold, the time series is not considered new anymore, and its own demand is used to generate the forecast.

 **Tip:**

Consider the threshold is set to five periods, and the first week of sales is 10 weeks ago, In this case, the item is not considered new anymore. Whatever Like Item strategy was selected for the item is not applied anymore and the forecast is generated based on its own demand.

## Like Item - Select and Approve Step

This step contains views that allow you to set up the forecasting strategy for New Items.

The available views are:

- [New Item Forecast View](#)
- [New Item Statistics View](#)
- [Select and Approve View](#)

## New Item Forecast View

In this view you are able to view the forecast of the New Item based on the selected strategy.

**Figure 3-8 New Item Forecast View**

New Item Forecast	
Calendar	3/2
Measure	
New Item Forecast Weekly Forecast	
Current New Item Forecast Weekly Forecast	

**Measures: New Item Forecast View**

The New Item Forecast view contains the following measures.

**New Item Forecast Weekly Forecast**

This measure displays the forecast resulting from a What-if action performed in the workbook. If the substitution method is **Like Item**, then this field has the New Item forecast based on the system recommended Like Item.

**Current New Item Forecast Weekly Forecast**

This measure displays the approved forecast calculated in batch. If no new item strategy has been selected prior to the batch run, this measure is empty.

## New Item Statistics View

The measures in this view are supporting the New Item setup process that happens mainly in the [Figure 3-10](#).

**Figure 3-9 New Item Statistics View**

New Item Statistics				
Product	1234768 - PL - 1...	1234769 - PL - F...	1234770 - PL - F...	1234771 - PL - B...
Measure				
Workflow Message Count	0	0	0	0
Store Count	0	0	0	0

**Measures: New Item Statistics View**

The New Item Statistics view contains the following measures.

**Workflow Message Count**

This measure displays the count of the Workflow Message measure in the Select and Approve view. The workflow messages are guiding you in the New Item setup process. If the count is zero, you have set up correctly all New Items. The count corresponds to the number of New Item/store combinations that you still have to finish setting up.

### Store Count

This measure displays the number of stores that a New Items has been set up for.

## Select and Approve View

This view enables you to set up your New Items for forecasting. Depending on the strategy you select in the Substitution Method, you can choose a fully automated process, or you may need to enter additional information. The workflow messages are guiding you through the process.

**Figure 3-10 Select and Approve View**

Select and Approve		
Location	1006 Chicago	1057 Green Bay
Measure		
Substitute Method	Base Rate of	None
User Provided Base Demand	0.00	0.00
User Selected Like Item		
Like Item Average Sales		
Forecast Start Date Override		
Approve Flag	<input type="checkbox"/>	<input type="checkbox"/>
Approve Date		
Adjustment Factor	1.00	1.00
Workflow Message	Existing Item	

### Measures: Select and Approve View

The Select and Approve view contains the following measures.

#### Substitute Method

This measure displays a list where you can select the substitute method. When a substitute method is used to forecast, the method set for an intersection is cleared once the Default Forecast Start Date is greater than the Forecast Start Date Override plus the Like TS Duration for the intersection. Valid substitute method options are:

- **None**

No forecast is created for the New Item.

- **Like Item**

The forecast is created using the base demand of a Like Item. The Like Item is selected in the User Selected Like Item measure in the Like Item - Select and Approve view. The forecast of the New Item is given by:

$$\text{Base demand New Item} = \text{base demand Like Item} * \text{Adjustment Factor}$$

Forecast at time t = base demand New Item \* seasonality at time t (coming from escalation level) \* promo and price effects (coming from pooling level)

- **Base Rate of Demand**

IPOCS-Demand Forecasting calculates the escalated base rate of demand. The forecast for the new item is given by::

$$\text{Forecast at time } t = \text{base rate of demand (coming from escalation level)} * \text{seasonality at time } t \text{ (coming from escalation level)} * \text{promo and price effects (coming from pooling level)}$$

- **User Input**

This method is very similar to Base Rate of Demand, with the difference that you have to manually specify a base rate of demand. The forecast is then generated using the same formula as for Base Rate of Demand.

#### **User Provided Base Demand**

If the User Input substitution method was selected, you have to enter here the base rate of demand that is going to be used for the New Item when generating forecast.

#### **User Selected Like Item**

If the Like Item substitution method was selected, you have to select here the Like Item whose base demand is going to be used for the New Item when generating forecast.

#### **Like Item Average Sales**

If you selected the Like Item substitution method, and have chosen a Like Item from the picklist, this measure displays the average sales of the Like Item. This is useful because it gives you an idea of the base rate of demand that is going to be used when generating the forecast for the New Item. It is not the exact value because it is recalculated every time the forecasting batch is run, but it is likely be very close.

#### **Forecast Startdate Override**

This is a very important measure because it identifies an item as being new. It can be loaded if the information can be interfaced from another system. If not available, you can manually set it.

#### **Approve Flag**

When the set up process for forecasting the New Item was successful, this measure becomes True and the measure displays a check mark. You are now ready to run the Approve New Items custom menu to approve the New Item forecast strategy.

#### **Approve Date**

This measure displays the date when the Like Item recommendation was approved by running the custom menu.

#### **Adjustment Factor**

The only demand component needed to generate forecast for New Items is base demand. If the Like Item substitution method is selected, the adjustment factor specifies what percent of a Like Item's base demand will be copied to the New Item.

### Workflow Message

The information in this measure guides you through the forecast setup process for New Items. It informs you on the next steps depending on the substitution method that you selected.

**Table 3-2 Workflow Message**

Message	Cause	Action
Substitution Method Not Set	You have identified a New Item and set the Forecast Startdate Override, but did not select a substitution method.	Select a Substitution Method
User Specified Like Item Not Set	You have identified a New Item and selected Like Item as substitution method, but you did not select a Like Item.	Select a User Selected Like Item
Base Demand Not Input By User	You have identified a New Item and selected Base Rate of Demand as substitution method, but you did not input a User Provided Base Demand.	Input a User Provided Base Demand
Existing Item	You have entered a Forecast Startdate Override for an item that is not new	Either clear the date to avoid confusion. Even if you do not, no action is taken for the item with respect to New Item forecast setup.

### Custom Menus

There are a two custom menus relevant to this view.

- **Approve New Items**

After you set up the strategy to forecast New Items, then running the custom menu approves the strategy. The setup includes selecting a substitution method, Like Items, and percent contribution, among others. After running the **Approve New Items** custom menu, the Approve Date measure is populated with the current date.

- **Recalculate Eligible Like Items**

When the workbook is built, the set of eligible Like Items is calculated using the last committed threshold values. You can change some threshold values in the workspace. For instance, lowering the Threshold Recent Sales Density will likely increase the number of eligible Like Items. To see the result of the threshold change, the **Recalculate Eligible Like Items** custom menu needs to be run.

## New Store Maintenance Workspace

Use this workspace to assign like stores to handle forecasting for New Stores. The like store assignment is manual and there is a good reason for it. New stores have a large financial impact, so it makes sense having a business person making the like store selection.

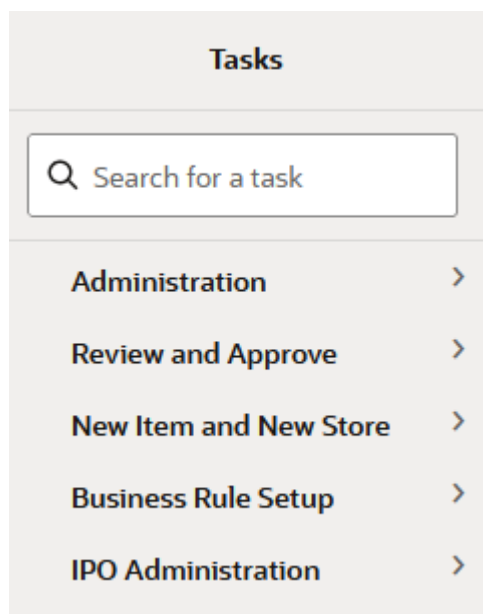
It is probably more appropriate than going with an automatic selection based on something like store attributes. Also, new store introductions are infrequent compared to New Item introductions, so manually handling New Stores is not a significant overhead activity.

To build the New Store Maintenance workspace, perform these steps:



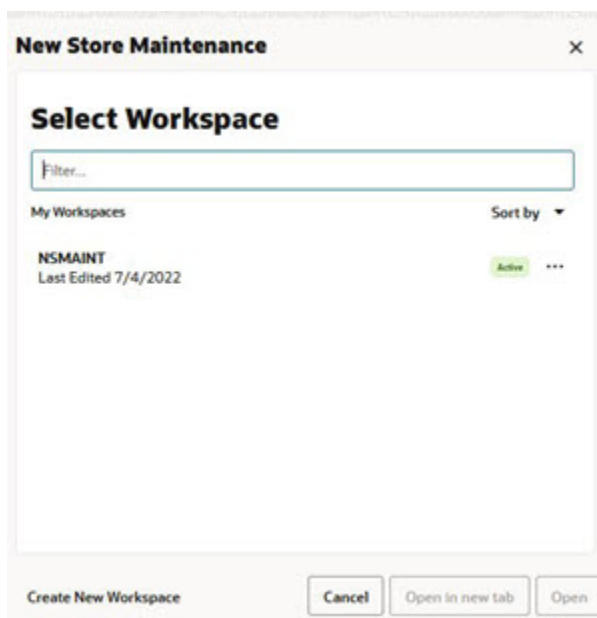
1. From the left sidebar menu, click the Task Module to view the available tasks.

**Figure 3-11 Task Module**



2. Click the **New Item/Store** activity and then click **New Item/Location** again to access the available workspaces.
3. Click **New Store Maintenance**. The New Store Maintenance wizard opens.  
You can open an existing workspace, but to create a new workspace, click **Create New Workspace**.

**Figure 3-12 New Store Maintenance Wizard**



4. Enter a name for your new workspace in the label text box and click **OK**.

Figure 3-13 Enter Workspace Label

5. Select the locations you want to work with and click **Finish**.

Figure 3-14 Workspace Wizard: Select Locations

6. The wizard notifies you that your workspace is being prepared. Successful workspaces are available from the Dashboard.

Figure 3-15 Successful Workspace Build

Description	Status	Task Type	Submitted by	Started/Scheduled	Completed	Record Status
ss	Success	WbBatch Build	oci.admin	7/6/22 2:32:48 PM	7/6/22 2:34:14 PM	---
Health-Check: Pendo Task	Scheduled	hc-pendo-task		7/7/22 12:00:00 AM		---

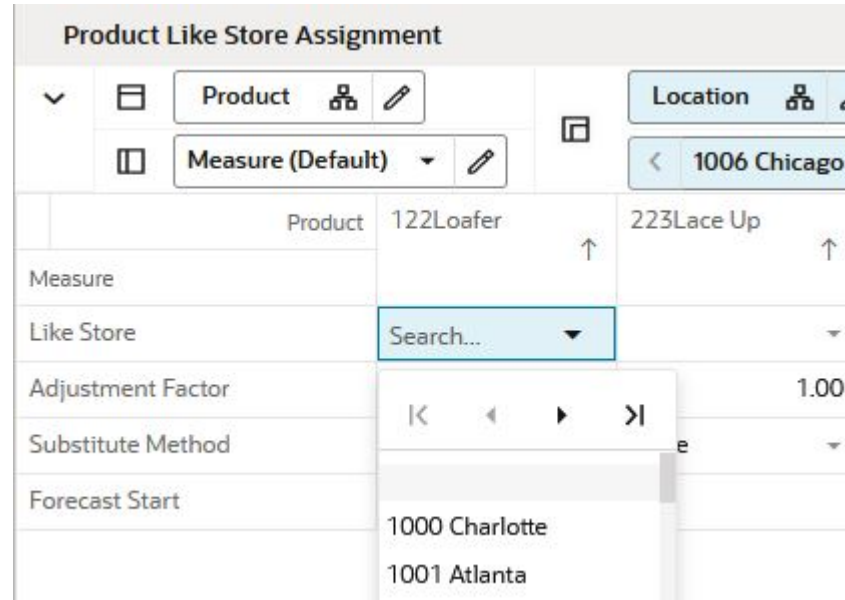
## Like Store Assignment Step

This step contains the [Product Like Store Assignment View](#).

## Product Like Store Assignment View

The Product Like Store Assignment view is at the intersection of prod/location, so all parameters can vary by product. For example, a new store opening in the Midwest can have a Like Store from Alaska for items in the Shovels department. However, for summer items, the Like Store is picked from the Northeast region.

**Figure 3-16 Product Like Store Assignment View**



**Measures: Product Like Store Assignment View**

The Product Like Store Assignment view contains the following measures.

**Like Store**

In this measure, you can specify the like store. Note how the like store can be different by product. In IPOCS-Demand Forecasting, a different like store selection can be made for every subclass.

**Adjustment Factor**

This measure is relevant to the Like Store Substitution method. It determines how much of the base rate of demand of a like store is applied to the new store. For instance, if the adjustment factor is 1.25, the base rate of demand of the new store is 1.25 times the base rate of demand of the like store.

**Substitute Method**

This measure displays a list where you can select the substitute method. When a substitute method is used to forecast, the method set for an intersection is cleared once the Default Forecast Start Date is greater than the Forecast Start Date Override plus the Like TS Duration for the intersection. Valid substitute method options are:

- **None**  
No forecast is created for the time series.
- **Like Store**  
If you select Like Store as strategy to generate forecast for the new store, the base demand of the new store is the base demand of the like store times the Adjustment Factor.

$$\text{Base demand new store} = \text{base demand like store} * \text{Adjustment Factor}$$

The forecast for the new store is calculated as:

$$\text{Forecast at time } t = \text{base demand new store} * \text{seasonality at time } t \text{ (coming from escalation level)} * \text{promo and price effects (coming from pooling level)}$$

## Forecast Start

This measure specifies the first date for which forecast is generated for the new store.

# New Item Management Workspace

### Note:

There are two workspaces that can help you with setting up New Items for forecast generation:

- [New Item Maintenance Workspace](#)—Use when item attributes are not available and you need to manually select Like Items from the New Item Maintenance workspace.
- [New Item Management Workspace](#) —Use when item attributes are available, the Like Item selection can be automated using the New Item Management workspace.

It is recommended to use only one of the two workspace options, depending on whether or not attributes are available. The other workspace can be easily hidden using Access Rights.

The workflow in the New Item Management workspace starts by selecting the New Items. An item is defined as new if it has a forecast startdate override that is in the future, that is., past `RPAS_TODAY`. The date can be loaded in the measure if available. If not, the date can be entered manually. Once you identified the New Item and the forecast startdate override is populated, you can select the substitution method. Depending on your selection, you may need to enter additional information. The workflow message measure will guide you through the process. For instance, if you choose *User Input*, you need to provide the *User Provided Base Demand*. If you do not provide the *User Provided Base Demand*, the workflow message warns you and displays *Base Demand Not Input By User*. You have successfully set up a New Item for forecasting when the workflow message is cleared and the Approval flag is selected. You finish by running the Approve New Items custom menu.

### Note:

You can work on multiple New Items and run the custom menu after you have set them all up.

Another helpful tool in the process of setting up New Items is the Workflow Message Count measure. It displays the number of item/store combinations that have been flagged as new, but have not yet been successfully set up. When setting up the New Items was successful the measure will display a count of zero.

There are a few key features that are available in the New Item Management that are not included in New Item Maintenance:

- System Recommended Like Item based on the similarity between new and existing items
- Ability to display a User Selected Like Item picklist that is sorted by the similarity between new and existing items

- Ability to control how many items are included in the User Selected Like Item picklist
- Ability to edit attribute weights and immediately see the updated Like Item recommendations

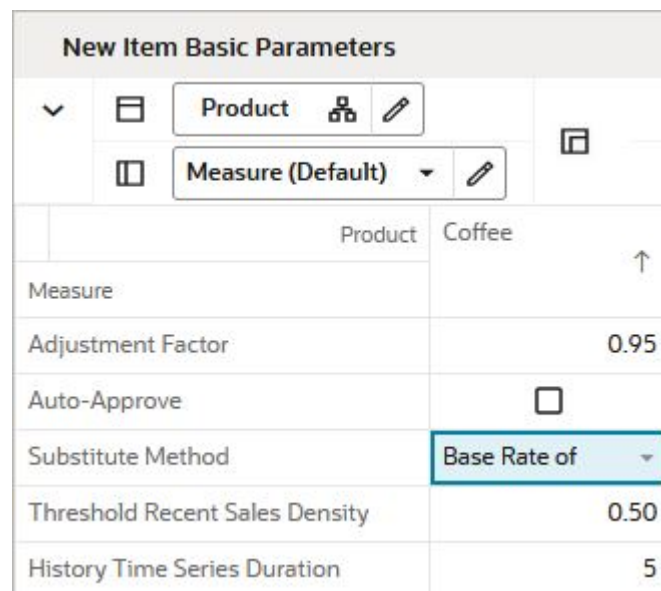
## Settings Step

This step contains the [New Item Basic Parameters View](#).

## New Item Basic Parameters View

The New Item Basic Parameters view is used to set default values for some parameters related to the New Item functionality.

**Figure 3-17 New Item Basic Parameters View**



New Item Basic Parameters	
Product	Coffee
Measure (Default)	
Measure	
Adjustment Factor	0.95
Auto-Approve	<input type="checkbox"/>
Substitute Method	Base Rate of
Threshold Recent Sales Density	0.50
History Time Series Duration	5

### Measures: New Item Basic Parameters View

The New Item Basic Parameters view contains the following measures.

#### Adjustment Factor

The only demand component needed to generate forecast for New Items is base demand. If the Like Item substitution method is selected, the adjustment factor specifies what percent of a Like Item's base demand will be copied to the New Item.

#### Auto-approve

You decide if automatic Like Item recommendations are automatically approved by selecting this measure. If the automatic Like Item recommendations are not automatically approved, the system suggested Like Items are still displayed, but not used in forecast generation.

#### Substitute Method

This measure displays a list where you can select the substitute method. When a substitute method is used to forecast, the method set for an intersection is cleared once the Default

Forecast Start Date is greater than the Forecast Start Date Override plus the Like TS Duration for the intersection. Valid substitute method options are:

- **None**

No forecast is created for the New Item

- **Like Item**

The forecast is created using the base demand of a Like Item. The Like Item is selected in the User Selected Like Item measure in the Like Item - Select and Approve view. The forecast of the New Item is given by:

$$\text{Base demand New Item} = \text{base demand Like Item} * \text{Adjustment Factor}$$

Forecast at time t = base demand New Item \* seasonality at time t (coming from escalation level) \* promo and price effects (coming from pooling level)

- **Base Rate of Demand**

IPOCS-Demand Forecasting calculates a base rate of demand based on items in the same class (dimension is configurable). The forecast for the New Item is given by:

$$\text{Forecast at time } t = \text{base rate of demand} * \text{seasonality at time } t \text{ (coming from escalation level)} * \text{promo and price effects (coming from pooling level)}$$

- **User Input**

This method is very similar to Base Rate of Demand, with the difference that you have to manually specify a base rate of demand. The forecast is then generated using the same formula as for Base Rate of Demand

### **Threshold Recent Sales Density**

In this measure, you enter the threshold for the data density. If the actual density is larger than the threshold, the time series qualifies to serve as Like Item/location for a new/item/location. The data density is calculated as:

$$\text{data density} = \text{number of periods with demand larger than zero} / \text{total length of demand}$$

For a time series with the following demand values:

0,1,0,1,0,today

The data density is  $2/4 = 50\%$

If the value for the threshold is zero, an item that is not actively selling can also be eligible as Like Item if it has an approved base demand.

This can be useful when the item to be introduced is a replacement or similar to an item that sold last season. In this case the base demand of the New Item will be modeled after the approved base demand of the item that it replaced.

### **History Time Series Duration**

In this measure you can enter the threshold for the historical demand duration to determine if a time series is considered. If the demand history is less than the threshold, the forecast of the new time series is generated using the New Item/store functionality. If the demand length is larger than the threshold, the time series is not considered new anymore, and its own demand is used to generate the forecast.

**Tip:**

Consider the threshold is set to five periods, and the first week of sales is 10 weeks ago. In this case, the item is not considered new anymore. Whatever Like Item strategy was selected for the item is not applied anymore and the forecast is generated based on its own demand.

**Recommended Number of Like Items** In this measure you specify how many item you want to see in the User Selected Like Item picklist, in the Select and Approve view. If you change the value, by clicking the Calculate custom menu, the picklist is regenerated to reflect the new setting. The items in the picklist are sorted by similarities, which are calculated using item attributes and their weights.

## Manage Step

This step contains views that allow you to set up the forecasting strategy for New Items.

The available views are:

- [New Item Attributes View](#)
- [New Item Statistics View](#)
- [Select and Approve View](#)
- [New Item Forecast View](#)

## New Item Attributes View

In this view you can view item attributes as well as their weights. The weights can be edited, and they are managed at an intersection higher than SKU. For instance, for the coffee class the Roast attribute has a weight of 0.4. Once you change the value of any attribute weight, the similarity matrix is recalculated. This also triggers the regeneration of the user Like Item picklist. The items in the picklist are sorted by similarities, which are calculated using item attributes and their weights.

**Figure 3-18 New Item Attributes View**

New Item Attributes								
Product Attributes		All Dimensions			Product		Location	
Measure (Default)		< Coffee @ >			< US @ >			
Product Attributes	Brand	Brand Tier	Roast	Segment	Subcategory	Subsegment	Trade Type	
Measure		↑↓	↑↓	↑↓	↑↓	↑↓	↑↓	↑↓
Attribute Weight	0.30	0.25	0.40	0.05	0.05	0.05	0.05	0.05

### Measures: New Item Attributes View

The New Item Attributes view contains the following measure.

#### Attribute Weight

This measure displays the current weight by item attributes.

## New Item Statistics View

The measures in this view are supporting the New Item setup process that happens mainly in the Select and Approve view.

**Figure 3-19 New Item Statistics View**

New Item Statistics					
Product		1234768 - PL - 1...	1234769 - PL - F...	1234770 - PL - F...	1234771 - PL - B...
Measure		↑	↑	↑	↑
Workflow Message Count		0	0	0	0
Store Count		0	0	0	0

### Measures: New Item Statistics View

The New Item Statistics view contains the following measures.

#### Workflow Message Count

This measure displays the count of the Workflow Message measure in the Like Item – Select and Approve view. The workflow messages are guiding you in the New Item setup process. If the count is zero, you have set up correctly all New Items. The count corresponds to the number of New Item/store combinations that you still have to finish setting up.

#### Store Count

This measure displays the number of stores that a New Items has been set up for.

## Select and Approve View

This view enables you to set up your New Items for forecasting. Depending on the strategy you select in the Substitution Method, you can choose a fully automated process, or you may need to enter additional information. The workflow messages are guiding you through the process.



**Figure 3-20 Select and Approve View**

Select and Approve		
Location	1006 Chicago	Product
Measure (Default)		1234768 - PL -
Location	1006 Chicago	1057 Green Bay
Measure		
Substitute Method	Base Rate of	None
User Provided Base Demand	0.00	0.00
User Selected Like Item		
Like Item Average Sales		
Forecast Start Date Override		
Approve Flag	<input type="checkbox"/>	<input type="checkbox"/>
Approve Date		
Adjustment Factor	1.00	1.00
Workflow Message	Existing Item	

### Measures: Select and Approve View

The Select and Approve view contains the following measures.

#### Substitute Method

This measure displays a list where you can select the substitute method. When a substitute method is used to forecast, the method set for an intersection is cleared once the Default Forecast Start Date is greater than the Forecast Start Date Override plus the Like TS Duration for the intersection. Valid substitute method options are:

- **None**

No forecast is created for the New Item.

- **Like Item**

The forecast is created using the base demand of a Like Item. The Like Item is selected in the User Selected Like Item measure in the Like Item - Select and Approve view. The forecast of the New Item is given by:

$$\text{Base demand New Item} = \text{base demand Like Item} * \text{Adjustment Factor}$$

Forecast at time t = base demand New Item \* seasonality at time t (coming from escalation level) \* promo and price effects (coming from pooling level)

- **Base Rate of Demand**

IPOCS-Demand Forecasting calculates the escalated base rate of demand. The forecast for the new item is given by:

*Forecast at time t = base rate of demand (coming from escalation level) \* seasonality at time t (coming from escalation level) \* promo and price effects (coming from pooling level)*

- **User Input**

This method is very similar to Base Rate of Demand, with the difference that you have to manually specify a base rate of demand. The forecast is then generated using the same formula as for Base Rate of Demand

**User Provided Base Demand**

If the User Input substitution method was selected, you have to enter here the base rate of demand that is going to be used for the New Item when generating forecast.

**Forecast Startdate Override**

This is a very important measure because it identifies an item as being new. It can be loaded if the information can be interfaced from another system. If not available, you can manually set it.

**Approve Date**

This measure displays the date when the Like Item recommendation was approved by running the custom menu.

**Adjustment Factor**

The only demand component needed to generate forecast for New Items is base demand. If the Like Item substitution method is selected, the adjustment factor specifies what percent of a Like Item's base demand will be copied to the New Item.

**Workflow Message**

The information in this measure guides you through the forecast setup process for New Items. It informs you on the next steps depending on the substitution method that you selected.

Message	Cause	Action
Substitution Method Not Set	You have identified a New Item and set the Forecast Startdate Override, but did not select a substitution method.	Select a Substitution Method
User Specified Like Item Not Set	You have identified a New Item and selected Like Item as substitution method, but you did not select a Like Item.	Select a User Selected Like Item
Base Demand Not Input By User	You have identified a New Item and selected Base Rate of Demand as substitution method, but you did not input a User Provided Base Demand.	Input a User Provided Base Demand
Existing Item	You have entered a Forecast Startdate Override for an item that is not new	Either clear the date to avoid confusion. Even if you do not, no action is taken for the item with respect to New Item forecast setup.

**Approved Like Item**

This measure is relevant if you selected the Like item substitution method. If you go through the process to set up the New Item, and use the System Recommended Like Item or override by selecting another Like Item from the User Selected Like Item picklist, the Approval Flag is checked. Running the Approve New Items custom menu populates this measure.

### System Recommended Like Item

This measure is relevant if you selected the Like item substitution method. Your environment needs to have item attributes and attributes weights, so similarities between new and existing items are calculated. In this case, the potential Like Items are sorted by their similarity scores, and the item with the highest score is displayed as the system recommendation.

Note how the Like Items are not displaying just the item label. First, you see a percentage. This represents how similar the Like Items are to the New Items. A value closer to 100% means high similarity. The second value shows the average demand of the Like Item. This is useful in selecting a Like Item, because it is an indication of forecast magnitude. This value is recalculated to reflect the latest data point, so what you see here may be outdated by a week. Finally the third element is the item label.

### User Selected Like Item

This measure is relevant if you selected the Like item substitution method. It shows a picklist with items that you can select to override the system recommendation. The number of items displayed in the picklist is set in the Recommended Number of Like Items measure in the Settings step.

Note how the Like Items are not displaying just the item label. First, you see a percentage. This represents how similar the Like Items are to the New Items. A value closer to 100% means high similarity. The second value shows the average demand of the Like Item. This is useful in selecting a Like Item, because it is an indication of forecast magnitude. This value is recalculated to reflect the latest data point, so what you see here may be outdated by a week. Finally the third element is the item label.

### Approve Flag

When the set up process for forecasting the New Item was successful, this measure becomes True and the measure displays a check mark. You are now ready to run the Approve New Items custom menu to approve the New Item forecast strategy.

### User Forecast

This measure displays the New Item Forecast based on the user-selected Like Item. This field is only populated when the substitution method is **Like Item** and the user-selected Like Item is provided.

### New Item Forecast

This measure displays the forecast resulting from a What-if action performed in the workbook. If the substitution method is **Like Item**, then this field has the New Item forecast based on the system recommended Like Item.

### Current New Item Forecast

This measure displays the New Item forecast from the previous batch run for new items not yet matured. If no New Item strategy has been selected prior to the batch run, then this measure is empty.

## New Item Forecast View

In this view you are able to view the forecast of the New Item based on the selected strategy.

Figure 3-21 New Item Forecast View

	Calendar	3/2/2019	3/9/2019
Measure		↑↓	↑↓
User Forecast Weekly Forecast		0.00	0.00
New Item Forecast Weekly Forecast		0.00	0.00
Current New Item Forecast Weekly Forecast		0.00	0.00

### Measures: New Item Forecast View

The New Item Forecast view contains the following measures.

#### User Forecast

This measure displays the New Item Forecast based on the user-selected Like Item. This field is only populated when the substitution method is **Like Item** and the user-selected Like Item is provided.

#### New Item Forecast

This measure displays the forecast resulting from a What-if action performed in the workbook. If the substitution method is **Like Item**, then this field has the New Item forecast based on the system recommended Like Item.

#### Current New Item Forecast

This measure displays the New Item forecast from the previous batch run for new items not yet matured. If no New Item strategy has been selected prior to the batch run, then this measure is empty.

## View Step

This step contains views that allow you to view item attributes and how attributes define similarities among items.

The available views are:

- [Attribute Value View](#)
- [Similarity Score View](#)

## Attribute Value View

This view displays attributes by product.

**Figure 3-22 Attribute Value View**

Product Attributes	Brand	Brand Tier	Format Size	Manufacturing Pr...	Roast	Segment	Subcategory	Trade Type
Measure								
Product Attribute of the Like Product	PI	Value	12 Oz	Non Organic	100 Columbian	Regular Caffeinated	Ground	Non Free Trade

**Measures: Attribute Value View**

The Attribute Value view contains the following measure.

**Product Attribute**

This measure displays the attributes of an item.

## Similarity Score View

In this view you can review the similarity scores between new and existing items. This view is Position Query (PQD) defined, so you can filter the Product hierarchy to show only positions corresponding to New Items.

**Figure 3-23 Similarity Score View**

Like Product	Product	Similarity Score
	1234772 - PL - ...	1.00
	1234768 - PL - 100% Columbian Non-Flavored Regular - Ground - 12 oz Can	0.67
	1234769 - PL - French Roast Non-Flavored Regular - Ground - 12 oz Bag	0.70
	1234770 - PL - French Roast Non-Flavored Regular - Whole - 12 oz Bag	0.67
	1234771 - PL - Breakfast Roast Non-Flavored Regular - Whole - 12 oz Bag	0.67
	1234772 - PL - Medium Roast Non-Flavored Regular - Ground - 12 oz Bag	0.00
	1234773 - PL - Dark Roast Non-Flavored Regular - Ground - 12 oz Bag	0.70
	1234774 - PL - French Roast Non-Flavored Decaf - Ground - 12 oz Bag	0.67
	1234775 - PL - Breakfast Roast Non-Flavored Decaf - Ground - 12 oz Bag	0.67
	1234776 - PL - 100% Columbian Non-Flavored Regular - Whole - 12 oz Bag	0.67
	1234777 - PL - 100% Columbian Non-Flavored Decaf - Ground - 12 oz Bag	0.67

### **Measures: Similarity Score View**

The Similarity Score view contains the following measures.

#### **Similarity Scores**

This measure displays the similarity scores among new and existing items.

#### **What-if Similarity Scores**

Similarity Scores are based on an item's attribute assignment and attribute weights and calculated in AI Foundation. The higher the number between two items the more similar the two items are. .

# 4

## Forecast Setup Task

This chapter describes the Forecast Setup task for IPOCS-Demand Forecasting.

### Forecast Setup Workspaces, Steps, and Views

The following table lists the workspaces, steps, and views for the Forecast Setup task.

**Table 4-1 Forecast Setup Workspaces, Steps, and Views**

Workspace	Step	Views
Forecast Setup Workspace	General Step	Basic Parameters View Advanced Parameters View Intermediate Level View Final Level View
	Exception Management Step	Basic Parameters View Intermediate Level View Final Level View

### Forecast Setup Workspace

The Forecast Setup workspace allows you access to all of the views listed in [Forecast Setup Workspace](#).

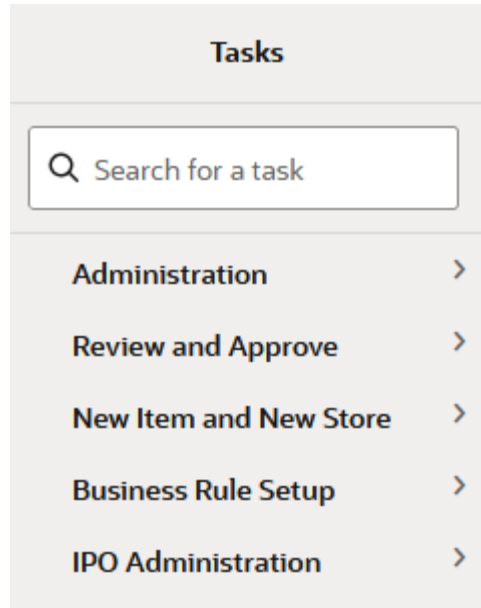
The workspace is intended for the business user, who sets high level forecast parameters such as forecast length, start, or end. It is also the place to select adjustment and approval strategies through the exception management capabilities provided by RPAS.

For details on forecasting algorithms and how to tune analytical parameters, refer to the *Oracle Retail AI Foundation Cloud Service User Guide*.

To build the Forecast Setup workspace, perform these steps:

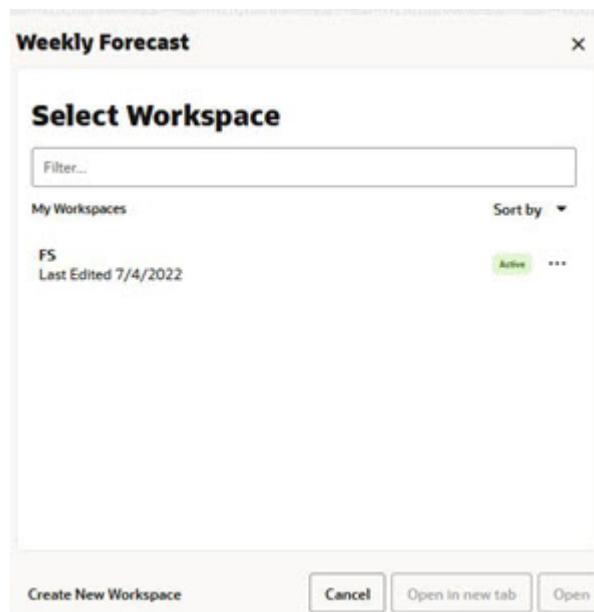
1. From the left sidebar menu, click the Task Module to view the available tasks.

Figure 4-1 Task Module



2. Click the **IPO Administration** activity and then click **Demand Forecast** to access the available workspaces.
3. Click **Setup Weekly Forecast**. The wizard opens.  
You can open an existing workspace, but to create a new workspace, click **Create New Workspace**.

Figure 4-2 Weekly Forecast Wizard



4. Enter a name for your new workspace in the label text box and click **OK**.



Figure 4-3 Enter Workspace Label

5. The Workspace wizard opens. Select the products you want to work with and click **Next**.

Figure 4-4 Workspace Wizard: Select Products

Levels & Positions		Label	
Company			
<input type="checkbox"/>	Level	<input type="checkbox"/>	Label
<input type="checkbox"/>	Company	<input type="checkbox"/>	1312Casual*
<input type="checkbox"/>	Division	<input type="checkbox"/>	1322Casual*
<input type="checkbox"/>	Group	<input checked="" type="checkbox"/>	Coffee
<input type="checkbox"/>	Department	<input type="checkbox"/>	Coffee Maker
<input checked="" type="checkbox"/>	Class	<input type="checkbox"/>	Missy Sweaters
<input type="checkbox"/>	Subclass	<input type="checkbox"/>	Missy Tops
<input type="checkbox"/>	Grandparent		
<input type="checkbox"/>	Parent		
<input type="checkbox"/>	Item		

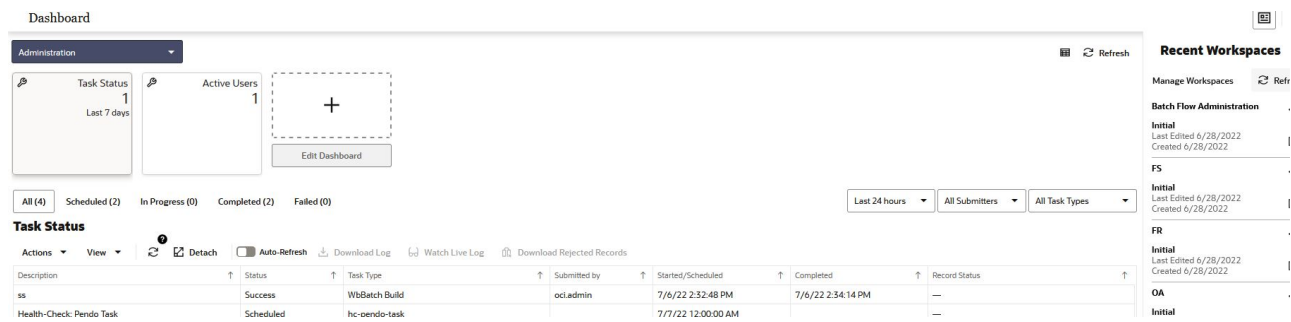
6. Select the locations you want to work with and click **Finish**.

Figure 4-5 Workspace Wizard: Select Locations

Levels & Positions		Label	
Company			
<input type="checkbox"/>	Level	<input type="checkbox"/>	Label
<input type="checkbox"/>	Company	<input type="checkbox"/>	11 Southeastern US
<input type="checkbox"/>	Chain	<input type="checkbox"/>	12 Northeastern US
<input type="checkbox"/>	Area	<input type="checkbox"/>	13 Midwest US
<input checked="" type="checkbox"/>	Region	<input type="checkbox"/>	14 Northcentral US
<input type="checkbox"/>	District	<input type="checkbox"/>	15 Southwestern US
<input type="checkbox"/>	Store	<input type="checkbox"/>	31 Eastern Canada
		<input type="checkbox"/>	32 Canadian Lakes
		<input type="checkbox"/>	33 Western Canada

7. The wizard notifies you that your workspace is being prepared. Successful workspaces are available from the Dashboard.

**Figure 4-6 Successful Workspace Build**



The Forecast Setup workspace is built. This workspace contains these steps:

- [General Step](#)
- [Exception Management Step](#)

## General Step

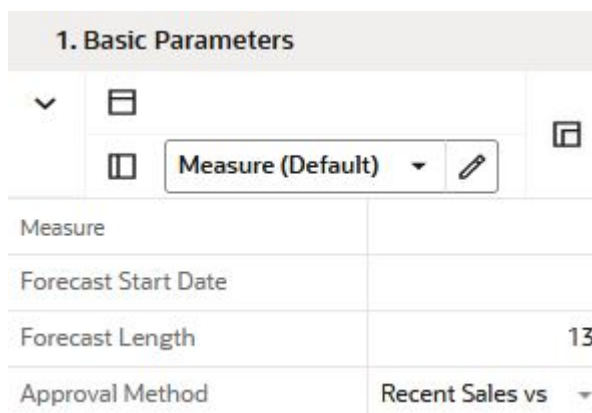
The available views are:

- [Basic Parameters View](#)
- [Advanced Parameters View](#)
- [Intermediate Level View](#)
- [Final Level View](#)

## Basic Parameters View

The Basic Parameters view allows you to view and set high level information. For instance, you can set the approval policy or determine the time frame for which forecast is required.

**Figure 4-7 Basic Parameters View**



### Measures: Basic Parameters View

The Basic Parameters view contains the following measures.

#### Forecast Start Date

This is the starting date of the forecast. If no value is specified at the time of forecast generation, the system uses the data/time at which the batch is executed as the default value. If a value is specified in this field and it is used to successfully generate the batch forecast, this value is cleared.

### Forecast Length

The Forecast Length is used with the Forecast Start Date to determine forecast horizon. The forecast length is based on the calendar dimension of the final-level. For example, if the forecast length is to be 10 weeks, the setting for a final-level at day is 70 (10 x 7 days).

### Approval Method

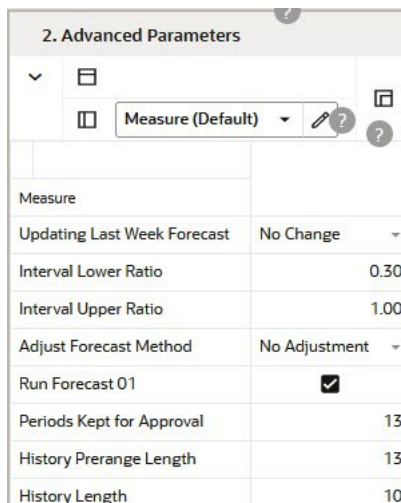
This field is a list from which you select the default automatic approval policy for forecast items. Valid values are:

- **Manual**  
The system-generated forecast is not automatically approved. Forecast values must be manually approved by accessing and amending the Forecast Review view
- **Auto**  
The system-generated quantity is automatically approved as is.
- **By Alert**  
This list of values may also include any Forecast Approval alerts that have been configured for use in the forecast approval process. Alerts are configured during the implementation and can be enabled to be used for Forecast Approval in the Enable Alert for Forecast Approval view. Refer to the *Oracle Retail Predictive Application Server Configuration Tools User Guide* for more information on alerts. The Alert Parameters view contains a list and descriptions of available alerts, and for which level (causal/baseline) that they are designed for.

## Advanced Parameters View

The Advanced Parameters view allows you to set default values for parameters that are less frequently accessed, such as History length or measures affecting cumulative interval calculations.

**Figure 4-8** Advanced Parameters View



2. Advanced Parameters	
Measure	Measure (Default)
Updating Last Week Forecast	No Change
Interval Lower Ratio	0.30
Interval Upper Ratio	1.00
Adjust Forecast Method	No Adjustment
Run Forecast 01	<input checked="" type="checkbox"/>
Periods Kept for Approval	13
History Prerange Length	13
History Length	10

## Measures: Advanced Parameters View

The Advanced Parameters view contains the following measures.

### Updating Last Week Forecast

This field is a list from which you can select the method for updating the Approved Forecast for the last specified number of weeks of the forecast horizon. This option is valid only if the Approval Method Override is set to Manual or Approve by alert, and the alert was rejected. The choices are:

- **No Change**  
When using this method, the last week in the forecast horizon does not have an Approved Forecast value. The number of weeks is determined number of weeks elapsed between the forecast start date and the last approval date.
- **Replicate**  
When using this method the last weeks in the forecast horizon are forecast using the Approved Forecast for the week corresponding to the last approval date.
- **Use Forecast**  
When using this method, the System Forecast for the last weeks in the forecast horizon is approved.

### Interval Lower Ratio

The value entered in this field multiplied by the forecast represents the lower bound of the confidence interval for a given period in the forecast horizon.

### Interval Upper Ratio

The value entered in this field multiplied by the forecast represents the upper bound of the confidence interval for a given period in the forecast horizon.

### Adjust Forecast Method

This measure allows you to choose how to automatically adjust the system generated forecast. The options are:

- **No Adjustment**  
No adjustment is made to the system generated forecast
- **Keep Last Change**  
If any adjustments were done to the forecast in the previous runs, they are reflected in the Adjusted Forecast measure. In this use case, the total forecast is retained.
- **Keep Last Baseline**  
If any adjustments were done in the Adjusted Baseline in the previous runs, they are retained. In this use case. the system calculated peaks are applied on the Adjusted Baseline
- **Keep Last Peak**  
If any adjustments were done in the Adjusted Peak measure in the previous runs, they are retained. In this use case, the adjusted peaks are applied on the system calculated baseline.

### Run Forecast

This field lets you specify if the forecast should be run for this final level. This is useful if multiple final levels are available, and the need is to forecast only a subset of them.

### Periods Kept for Approval

This measure lets you specify how many periods before today you want to keep for the approved forecast. For instance if the number you enter is **5**, the approved forecast will be populated for the forecast horizon in the future and for five weeks in the past.

### History Prerange Length

This measure lets you control how many calendar positions are showed in the wizard prior to RPAS\_TODAY when building the Forecast Review workbook.

The historical positions (before RPAS\_TODAY/forecast start date) displayed in the wizard are decided by the number entered here, and the history length used to forecast the level.

If the number displayed here is 10 and the history length is 17, the number of positions before today, are pre-ranged in the wizard to:

$$\text{MAX (History Prerange Length, History Length)} = \text{MAX (10, 17)} = 17$$

### History Length

This measure lets you control how many periods are used by the forecast engine when calculating the base demand.

## Intermediate Level View

It allows you to view and set high level information, but below the global settings. For instance, you can select the approval policy or determine the history length used to calculate base demand.

**Figure 4-9 Intermediate Level View**

	Product	Ground	Instant
Measure		↑	↑
Forecast Length at Intermediate			
Approve Method at Intermediate		▼	▼
Adjust Forecast Method at Intermediate		▼	▼
History Length at Intermediate			

### Measures: Intermediate Level View

The Intermediate Level view contains the following measures.

#### Forecast Length at Intermediate

The Forecast Length is used with the Forecast Start Date to determine forecast horizon. The forecast length is based on the calendar dimension of the final-level. For example, if the forecast length is to be 10 weeks, the setting for a final-level at day is 70 (10 x 7 days).

If the final level is at day, and the forecast length override is specified, it can happen that the week level forecast is generated for an additional week in the future. However, when spread to day, the forecast length is respected.

The previous circumstance covers for the following case. The forecast is generated on a Tuesday, and the forecast length override 14. If a week is starting Monday, the forecast generated at week level is going to be three weeks long. However, it is going to be spread to day for only the desired 14 days.

### **Approve Method at Intermediate**

This field is a list from which you select the default automatic approval policy for forecast items. Valid values are:

- **Manual**

The system-generated forecast is not automatically approved. Forecast values must be manually approved by accessing and amending the Forecast Review view.
- **Automatic**

The system-generated quantity is automatically approved as is.
- **By Alert**

This list of values may also include any Forecast Approval alerts that have been configured for use in the forecast approval process. Alerts are configured during the implementation and can be enabled to be used for Forecast Approval in the Enable Alert for Forecast Approval view. Refer to the *Oracle Retail Predictive Application Server Configuration Tools User Guide* for more information on alerts. The Alert Parameters view contains a list and descriptions of available alerts, and for which level (causal/baseline) that they are designed for.

### **Adjust Forecast Method at Intermediate**

This measure allows you to automatically adjust the system generated forecast.

The options are:

- **No Adjustment**

No adjustment is made to the system generated forecast
- **Keep Last Change**

If any adjustments were done to the forecast in the previous runs, they are reflected in the Adjusted Forecast measure. In this use case, the total forecast is retained.
- **Keep Last Baseline**

If any adjustments were done in the Adjusted Baseline in the previous runs, they are retained. In this use case, the system calculated peaks are applied on the Adjusted Baseline
- **Keep Last Peak**

If any adjustments were done in the Adjusted Peak measure in the previous runs, they are retained. In this use case, the adjusted peaks are applied on the system calculated baseline.

### **History Length at Intermediate**

This is the override of the History Length in Basic Parameters.

## Final Level View

The Final Level view allows you to override some default measures, such as forecast start and end dates, or override the approval policy.

**Figure 4-10 Final Level View**

4. Final Level		
Product	1234768 - PL - 1...	1234769 - PL - F...
Location	1006 Chicago	
Measure		
Forecast Start Date at Final		
Forecast Length at Final		
Forecast End Date at Final		
Approval Method at Final		
Adjust Forecast Method at Final		
History Length at Final		

### Measures: Final Level View

The Final Level view contains the following measures.

#### Forecast Start Date at Final

This is the override of the Forecast Start Date in Basic Parameters.

If the final level is at day, and the forecast length override is specified, it can happen that the week level forecast is generated for an additional week in the future. However, when spread to day, the forecast length is respected.

The previous circumstance covers for the following case. The forecast is generated on a Tuesday, and the forecast length override 14. If a week is starting Monday, the forecast generated at week level is going to be three weeks long. However, it is going to be spread to day for only the desired 14 days.

#### Forecast End Date at Final

This is the override of the Forecast End Date in Basic Parameters.

#### Approval Method at Final

Set only at the final-level, the Approval Method at Final is a list from which you select the approval policy for individual product/location combinations. The options are:

- **No Override**  
The default approval policy is used
- **Manual**  
The system-generated forecast is not automatically approved. Forecast values must be manually approved by accessing and amending the Forecast Review view
- **Auto**  
The system-generated quantity is automatically approved as is.
- **By Alert**  
This list of values may also include any Forecast Approval alerts that have been configured for use in the forecast approval process. Alerts are configured during the implementation and can be enabled to be used for Forecast Approval in the Enable Alert for Forecast Approval view. Refer to the *Oracle Retail Predictive Application Server Configuration Tools User Guide* for more information on alerts. The Alert Parameters view contains a list and descriptions of available alerts, and for which level (causal/baseline) that they are designed for.

#### **Adjust Forecast Method at Final**

This is the override of the Adjust Forecast Method in Advanced Parameters .

#### **History Length at Final**

This is the override of the History Length in Basic Parameters.

#### **Assortment Start Date**

If the Lifecycle Allocation and Replenishment solution is implemented, this measure displays the Assortment Start Date from the solution. This date can serve as the Forecast Start Date for the item/store combination.

#### **Assortment End Date**

If the Lifecycle Allocation and Replenishment solution is implemented, this measure displays the Assortment End Date from the solution. This date can serve as the Forecast End Date for the item/store combination. Note that the actual end date is given by the Assortment End Date or the end of the forecast horizon, whichever comes first.

## Exception Management Step

The available views are:

- [Basic Parameters View](#)
- [Intermediate Level View](#)
- [Final Level View](#)

### Basic Parameters View

The Basic Parameters view allows you to view and edit threshold for approval exceptions.



Figure 4-11 Basic Parameters View

1. Basic Parameters	
Measure	
Alert - Calculation Periods	5
Alert - Error Threshold	0.35
Alert - Average Sales Threshold	1.00
Recent Sales Window	52
Current Period Window	13
Historic Period Window	52
Alert - Causal Peak Factor	1.00

### Measures: Basic Parameters View

The Basic Parameters view contains the following measures.

#### Alert – Calculation Periods

The number stored in this field defines the number of calculations periods used in generating exceptions.

#### Alert – Error Threshold

This field stores the value that determines if a forecast error is acceptable, or if it needs to be flagged as exception.

#### Alert – Average Sales Threshold

Threshold used in deciding if average sales are high or low, depending on how they compare against the value.

#### Alert - Causal Peak Factor

This measure is relevant for promotional forecasting. The current forecast values are divided by the maximum historical demand. If the result is larger than the value of this measure, the forecast may be too large and an exception is triggered

#### Recent Sales Window

This field determines the time frame over which recent sales are considered in the exception calculations.

#### Current Period Window

This field stores the number of periods, going back from today, used to calculate various key metrics, such as service level or number of out-of-stock units. This is meant to be for the current periods, so the value should be something reflecting the current state. For instance the current service level could be calculated for the past week, so four or five periods

### Historic Period Window

This field stores the number of periods, going back from today, used to calculate various key metrics, such as service level or number of out-of-stock units. This is meant to be for the historic level, so the value should be something reflecting a longer past period. For instance the current service level could be calculated for the past year or half year, so twenty six or fifty two periods.

## Intermediate Level View

The Intermediate Level view allows you to view and edit threshold for approval exceptions at a level lower than in the Basic Parameters view. A typical level is subclass/region.

**Figure 4-12 Intermediate Level View**

	Product	Location
Measure	Ground ↑	Instant ↑
Alert - Calculation Periods at Intermediate		
Alert - Error Threshold at Intermediate		
Alert - Average Sales Threshold at Intermediate		
Recent Sales Window at Intermediate		
Current Period Window at Intermediate		
Historic Period Window at Intermediate		
Alert - Causal Peak Factor at Intermediate		

### Measures: Intermediate Level View

The Intermediate Level View contains the following measures.

#### Alert – Calculation Periods at Intermediate

The number stored in this field defines the number of calculations periods used in generating exceptions.

#### Alert – Error Threshold at Intermediate

This field stores the value that determines if a forecast error is acceptable, or if it needs to be flagged as exception.

#### Alert – Average Sales Threshold at Intermediate

Threshold used in deciding if average sales are high or low, depending on how they compare against the value.

### Recent Sales Window at Intermediate

This field determines the time frame over which recent sales are considered in the exception calculations.

### Current Period Window at Intermediate

This field stores the number of periods, going back from today, used to calculate the service level. This is meant to be for the current level, so the value should be something reflecting the current state. For instance the current service level could be calculated for the past week, so four or five periods.

### Historic Period Window at Intermediate

This field stores the number of periods, going back from today, used to calculate the service level. This is meant to be for the historic level, so the value should be something reflecting a longer past period. For instance the current service level could be calculated for the past year or half year, so twenty six or fifty two periods.

### Alert - Causal Peak Factor at Intermediate

This measure is relevant for promotional forecasting. The current forecast values are divided by the maximum historical demand. If the result is larger than the value of this measure, the forecast may be too large and an exception is triggered.

## Final Level View

The Final Level view allows you to view and edit threshold for approval exceptions at a levels typically lower than in both the Basic Parameters as well as Intermediate Level views. The intersection may be as low as item/store.

Figure 4-13 Final Level View

3. Final Level		
	Product	Location
	1234768 - PL - 1...	1234769 - PL - F...
Measure	↑	↑
Alert - Average Sales Threshold at Final		
Alert - Calculation Periods at Final		
Alert - Error Threshold at Final		
Alert - Causal Peak Factor at Final		
Recent Sales Window at Final	0	0
Current Period Window at Final	0	0
Historic Period Window at Final	0	0

# 5

## Forecast Review Task

This chapter describes the Forecast Review for IPOCS-Demand Forecasting.

### Forecast Review Workspaces, Steps, and Views

The following table lists the workspaces, steps, and views for the Forecast Review task.

**Table 5-1 Forecast Review Workspaces, Steps, and Views**

Workspace	Step	Views
<a href="#">Forecast Review Workspace</a>	<a href="#">Approve Step</a>	<a href="#">Forecast Results View</a> <a href="#">Approve Information View</a> <a href="#">Forecast Results Chart View</a> <a href="#">What-if Parameters View</a> <a href="#">Preprocessing Details View</a>

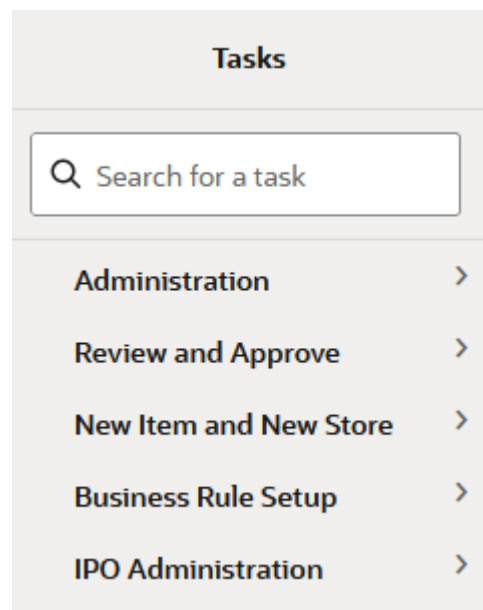
### Forecast Review Workspace

The Forecast Review workspace allows you access to all of the views listed in [Forecast Review Workspaces, Steps, and Views](#).

To build the Forecast Review workspace, perform these steps:

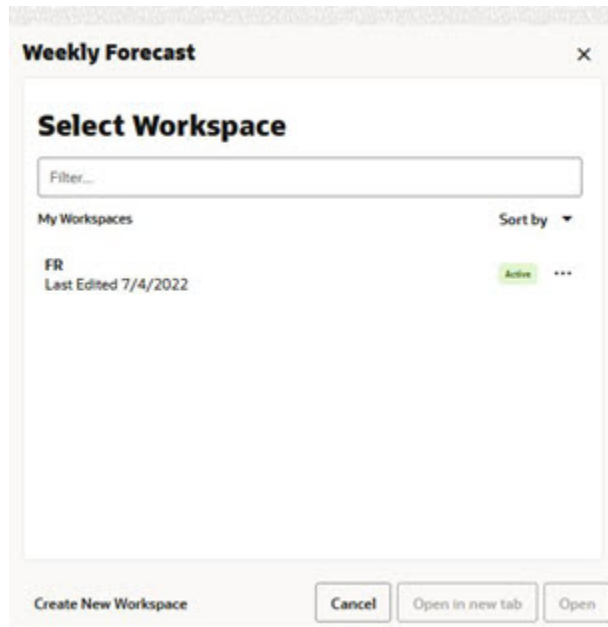
1. From the left sidebar menu, click the Task Module to view the available tasks.

**Figure 5-1 Task Module**



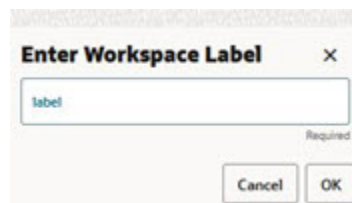
2. Click the **Review and Approve** activity to access the available workspaces.
3. Click **Demand Weekly Forecast**. The wizard opens.  
You can open an existing workspace, but to create a new workspace, click **Create New Workspace**.

Figure 5-2 Weekly Forecast



4. Enter a name for your new workspace in the label text box and click **OK**.

Figure 5-3 Enter Workspace Label



5. The Workspace wizard opens. Select the products you want to work with and click **Next**.

Figure 5-4 Workspace Wizard: Select Products

### Select Products

Levels & Positions

Company	Label
<input type="checkbox"/> Level	<input type="checkbox"/> Label
<input type="checkbox"/> Company	<input type="checkbox"/> 1312Casual*
<input type="checkbox"/> Division	<input type="checkbox"/> 1322Casual*
<input type="checkbox"/> Group	<input checked="" type="checkbox"/> Coffee
<input type="checkbox"/> Department	<input type="checkbox"/> Coffee Maker
<input checked="" type="checkbox"/> Class	<input type="checkbox"/> Missy Sweaters
<input type="checkbox"/> Subclass	<input type="checkbox"/> Missy Tops
<input type="checkbox"/> Grandparent	
<input type="checkbox"/> Parent	
<input type="checkbox"/> Item	

- The Workspace wizard opens. Select the locations you want to work with and click **Next**.

Figure 5-5 Workspace Wizard: Select Locations

### Select Locations

Levels & Positions

Company	Label
<input type="checkbox"/> Level	<input type="checkbox"/> Label
<input type="checkbox"/> Company	<input type="checkbox"/> 11 Southeastern US
<input type="checkbox"/> Chain	<input type="checkbox"/> 12 Northeastern US
<input type="checkbox"/> Area	<input type="checkbox"/> 13 Midwest US
<input checked="" type="checkbox"/> Region	<input type="checkbox"/> 14 Northcentral US
<input type="checkbox"/> District	<input type="checkbox"/> 15 Southwestern US
<input type="checkbox"/> Store	<input type="checkbox"/> 31 Eastern Canada
	<input type="checkbox"/> 32 Canadian Lakes
	<input type="checkbox"/> 33 Western Canada

- Select the time periods you want to work with and click **Finish**.

Figure 5-6 Workspace Wizard: Select Available Calendar Positions

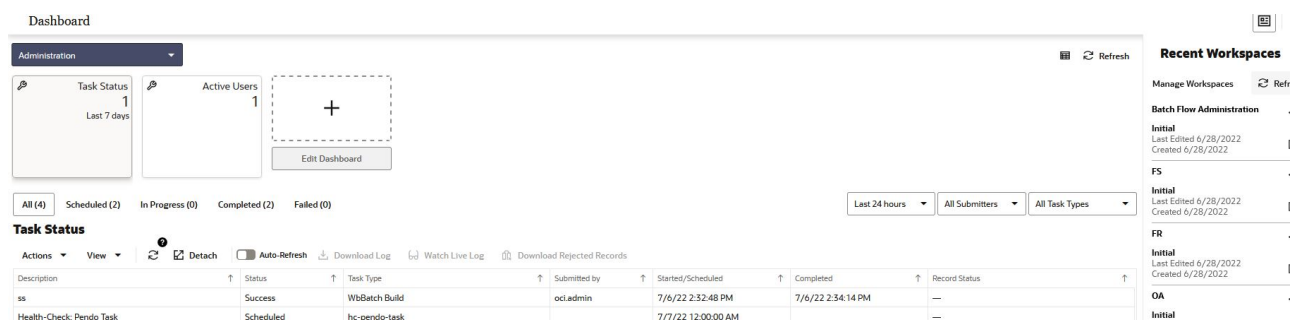
### Select Calendar

Levels & Positions

Year	Label
<input type="checkbox"/> Level	<input checked="" type="checkbox"/> Label
<input type="checkbox"/> Year	<input checked="" type="checkbox"/> Dec FY2018
<input type="checkbox"/> Half	<input checked="" type="checkbox"/> 1/5/2019
<input type="checkbox"/> Quarter	<input checked="" type="checkbox"/> Jan FY2019
<input checked="" type="checkbox"/> Month	<input checked="" type="checkbox"/> 1/12/2019
<input checked="" type="checkbox"/> Week	<input checked="" type="checkbox"/> 1/19/2019
	<input checked="" type="checkbox"/> 1/26/2019
	<input checked="" type="checkbox"/> 2/2/2019
	<input checked="" type="checkbox"/> Feb FY2019

- The wizard notifies you that your workspace is being prepared. Successful workspaces are available from the Dashboard.

**Figure 5-7 Successful Workspace Build**



## Approve Step

The available views are:

- [Forecast Results View](#)
- [Approve Information View](#)
- [Forecast Results Chart View](#)
- [What-if Parameters View](#)
- [Preprocessing Details View](#)

## Forecast Results View

The Forecast Results view shows all information related to forecast generation. It shows the forecast with its components, baseline and promotional peaks. It also shows sales of last year, and cumulative interval information.

The navigation of this worksheet is very conveniently driven by real time or workbook alerts.

### Note:

There is a duplicate of this view - [Forecast Results Chart View](#)- that is intended to show the information in chart form.

If not already in chart mode, you need to change the view type from pivot table to chart and save the format. This is a one-time action.

Figure 5-8 Forecast Results View

1. Forecast Results			
Calendar	4/13/2019	4/20/2019	
Measure	↑	↑	↑
Adjusted Forecast	153.36	139.84	184.57
Adjusted Baseline	153.36	139.84	184.57
Approved Forecast	153.36	139.84	184.57
Approved System Forecast	153.36	139.84	184.57
Preprocessed Sales	0.00	0.00	0.00
Last Year Sales	163.96	154.00	136.00
Event			
Discount	0.00	0.00	0.00
Last Last Year Sales	0.00	0.00	0.00
System Forecast	153.36	139.84	184.57
System Baseline	153.36	139.84	184.57
What-If Baseline	0.00	0.00	0.00
Adjusted Cumint	46.01	62.26	83.32
Approved Cumint	46.01	62.26	83.32

**Measures: Forecast Results View**

The Forecast Results view contains the following measures.

**Adjusted Forecast**

This is a read-only measures that equals the adjusted baseline plus the adjusted peaks.

**Adjusted Baseline**

The value in this field initially defaults to the System Baseline if the forecast is automatically approved by the system or through a Forecast Approval Alert. Otherwise, the value in the Adjusted Baseline is different than the System Baseline if:

- Adjusted Baseline has been updated by you.
- Keep Last Changes is selected.
- Update Last Weeks Forecast is set to Replicate.



- Changes to the Adjusted Baseline are automatically approved. The Approval view updates with the date of the adjustment and the name of the user who made the adjustment.
- Demand transference is selected as the adjustment method in forecast setup and significant demand transference effects are available.

### **Approved Forecast**

The Approved Forecast is the forecast quantity that was approved at the time of the task build. The values contained in this measure are read-only. If changes are made to the Adjusted Forecast, then click Calculate to show the new value in the Approved Forecast.

### **Approved System Forecast**

The Approved System Forecast is populated with the last System Forecast approved for a time series:

1. Approval Method set to Automatic Approval
2. Approval Method set to a Forecast Approval Alert and the alert is not triggered
3. Update Last Weeks Forecast is set to Use Forecast

### **Preprocessed Sales**

This read-only measure is the demand data used to generate the forecast. This allows you to compare Actuals to forecast values. The preprocessed sales are based on the historical sales which are undergoing several rounds corrections.

### **Last Year Sales**

#### **Event**

This measure displays at the item, location, and week level if one or more offers were active. This usually goes together with the Discount measure.

#### **Discount**

This is the discount from the full price for which a product was sold at a given location for a given time period.

### **Last Last Year Sales**

#### **System Forecast**

This is a read-only measures that equals the system baseline plus the system peaks.

#### **System Baseline**

The System Baseline displays the system generated baseline forecast. The values contained in this field are read-only. The system baseline incorporates level, trend, seasonality, but no causal-related information.

#### **What-if Baseline**

In the What-if Parameters view you can change some forecast parameters and see how they impact the forecast. The resulting forecast is stored in this measure. If you like the change, you can run the Copy What-if custom menu, and the forecast is copied in the Adjusted Forecast measure

#### **Adjusted Cumint**

Cumulative Intervals are used in safety stock calculation within allocation and replenishment systems. Its value is similar to a running total of a percentage of the actual forecast and is read-only.

## Approved Cumint

Cumulative Intervals are used in safety stock calculation within allocation and replenishment systems. Its value is similar to a running total of a percentage of the actual forecast and is read-only.

## Error Metrics

To assist the forecast analyst in deciding which forecasts to review, there are several error metrics that can be reviewed.

When the accuracy is good with only a small error, the analyst may decide to move on and review other forecasts. When an item performs poorly, the analyst may want to spend some time to adjust the forecast values.

The error metrics are:

- Weighted Absolute Percentage Error
- Mean Absolute Error
- Root Mean Squared Error
- Forecast Bias

Figure 5-9 shows the error metrics calculations. Note that they are calculated for each time period

**Figure 5-9 Error Metrics Calculations**

Weighted Absolute Percentage Error	$WAPE = \frac{1}{n} \frac{\sum_{today-1}^{today-n}  F_t - A_t }{\sum_{today-1}^{today-n} A_t}$
Mean Absolute Error	$MAE = \frac{1}{n} \sum_{today-1}^{today-n}  F_t - A_t $
Root Mean Squared Error	$RMSE = \sqrt{\frac{\sum_{today-1}^{today-n} (F_t - A_t)^2}{n}}$
Forecast Bias	$BIAS = \frac{1}{n} \sum_{today-1}^{today-n} (F_t - A_t)$

## Approve Information View

The Approve Information view shows information around the approval process, like which user approved the forecast, when it was approved and potential notes.

Figure 5-10 Approve Information View

2. Approve Information	
<input type="checkbox"/>	All Dimension:
<input type="checkbox"/> Measure (Default)	< 1234773 -
Measure	.
Approve By	system
Approval Comment	refused by fralrt01
Violated Exceptions	Forecast vs Recent
Approval Date	03/31/2019
Approve	<input type="checkbox"/>
Active Forecast Items	<input checked="" type="checkbox"/>
LLC Indicator	<input type="checkbox"/>
Mean Absolute Error	210.00
Root Mean Squared Error	246.39
Weighted Absolute Percentage Error	20.00%
Forecast Bias	-210.00

**Measures: Approve Information View**

The Approve Information view contains the following measures.

**Adjust Forecast Method**

This measure displays the adjustment method used to programmatically adjust the system forecast. The options are:

- **No Adjustment**  
No adjustment is made to the system generated forecast
- **Keep Last Change**  
If any adjustments were done to the forecast in the previous runs, they are reflected in the Adjusted Forecast measure. In this use case, the total forecast is retained.
- **Keep Last Baseline**  
If any adjustments were done in the Adjusted Baseline in the previous runs, they are retained. In this use case, the system calculated peaks are applied on the Adjusted Baseline
- **Keep Last Peak**

If any adjustments were done in the Adjusted Peak measure in the previous runs, they are retained. In this use case, the adjusted peaks are applied on the system calculated baseline.

### **Approve By**

Approved By is a read-only field that displays the name of the user to approve forecasts for an item/location. This field may be populated with **Sys** if the system was set to automatically approve forecasts during the batch forecast process.

### **Approval Comment**

Approval Comment is a field in which notes may be entered regarding the forecast values or any pertinent information for specified product/location combinations.

### **Violated Exceptions**

This field displays which (if at all) approval exception business rule was violated.

### **Approval Date**

Approval Date is a read-only field that displays the date that the forecast quantity is approved either automatically during the batch forecast process or when changes are made to the Adjusted Forecast. This information is necessary for IPOCS-Demand Forecasting to carry out any subsequent processes, such as replenishment procedures.

### **Approve**

This field may be selected if you want to accept the System Forecast quantity for a time series that has yet to be approved. The flag is also activated when a change is made to the Adjusted Forecast and Calculate occurs. When this flag is activated, the time series for an item/location are approved and both the Approval Date and Approved By fields are updated.

### **Active Forecast Items**

This field indicates if an item/store qualifies to have a forecast generated.

### **Error Metrics**

To assist the forecast analyst in deciding which forecasts to review, there are several error metrics that can be reviewed.

When the accuracy is good with only a small error, the analyst may decide to move on and review other forecasts. When an item performs poorly, the analyst may want to spend some time to adjust the forecast values.

The error metrics are:

- Weighted Absolute Percentage Error
- Mean Absolute Error
- Root Mean Squared Error
- Forecast Bias

Figure 5-11 shows the error metrics calculations. The errors are calculated using total adjusted sales (preprocessed) and approved forecast values in history. The time periods used in the calculation are given by the Error Calculation Window measure in the Forecast Setup workspace.

Figure 5-11 Error Metrics Calculations

Weighted Absolute Percentage Error	$WAPE = \frac{1}{n} \frac{\sum_{today-1}^{today-n}  F_t - A_t }{\sum_{today-1}^{today-n} A_t}$
Mean Absolute Error	$MAE = \frac{1}{n} \sum_{today-1}^{today-n}  F_t - A_t $
Root Mean Squared Error	$RMSE = \sqrt{\frac{\sum_{today-1}^{today-n} (F_t - A_t)^2}{n}}$
Forecast Bias	$BIAS = \frac{1}{n} \sum_{today-1}^{today-n} (F_t - A_t)$

## Forecast Results Chart View

The Forecast Results view shows all information related to forecast generation. It shows the forecast with its components, baseline and promotional peaks. It also shows sales of last year, and cumulative interval information.

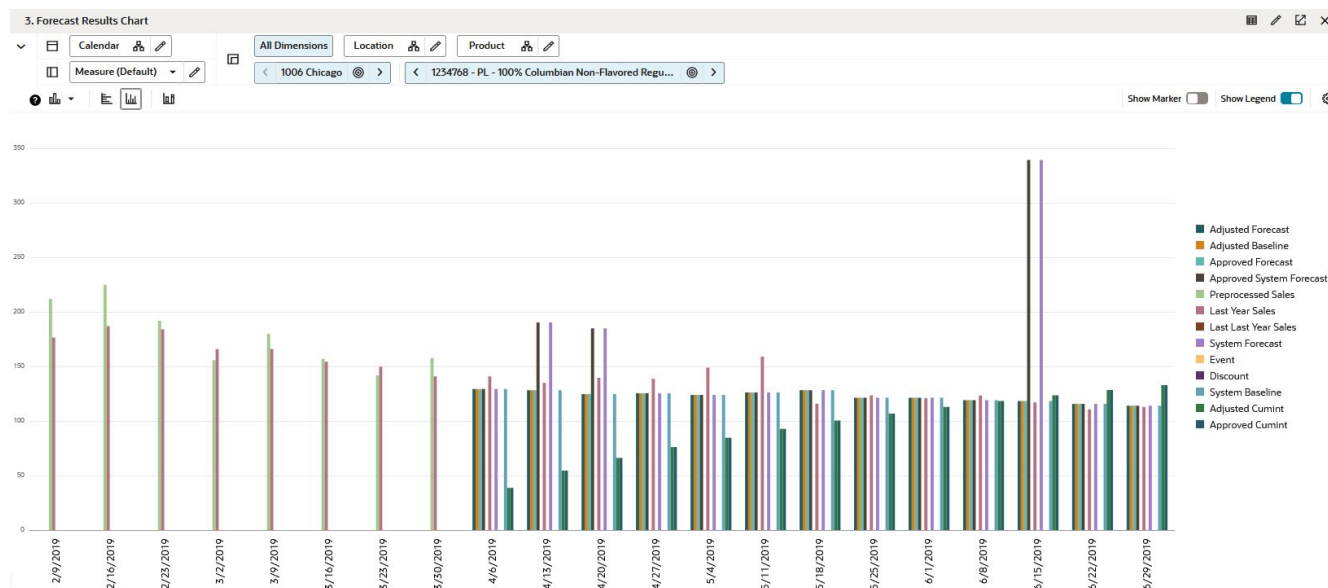
The navigation of this worksheet is very conveniently driven by real time or workbook alerts.

### Note:

There is a duplicate of this view - [Forecast Results View](#) - that is intended to show the information in table form.

If not already in chart mode, you need to change the view type from pivot table to chart and save the format. This is a one-time action.

Figure 5-12 Forecast Results Chart View



### Measures: Forecast Results Chart View

The Forecast Results Chart view contains the following measures.

#### Adjusted Forecast

This is a read-only measure that equals the adjusted baseline plus the adjusted peaks.

#### Adjusted Baseline

The value in this field initially defaults to the System Baseline if the forecast is automatically approved by the system or through a Forecast Approval Alert. Otherwise, the value in the Adjusted Baseline is different than the System Baseline if:

- Adjusted Baseline has been updated by you.
- Keep Last Changes is selected.
- Update Last Weeks Forecast is set to Replicate.
- Changes to the Adjusted Baseline are automatically approved. The Approval view updates with the date of the adjustment and the name of the user who made the adjustment.
- Demand transference is selected as the adjustment method in forecast setup and significant demand transference effects are available.

#### Approved Forecast

The Approved Forecast is the forecast quantity that was approved at the time of the task build. The values contained in this measure are read-only. If changes are made to the Adjusted Forecast, then click Calculate to show the new value in the Approved Forecast.

#### Approved System Forecast

The Approved System Forecast is populated with the last System Forecast approved for a time series:

1. Approval Method set to Automatic Approval
2. Approval Method set to a Forecast Approval Alert and the alert is not triggered

### 3. Update Last Weeks Forecast is set to Use Forecast

#### **Preprocessed Sales**

This read-only measure is the demand data used to generate the forecast. This allows you to compare Actuals to forecast values. The preprocessed sales are based on the historical sales which are undergoing several rounds corrections.

#### **Last Year Sales**

#### **Event**

This measure displays at the item, location, and week level if one or more offers were active. This usually goes together with the Discount measure.

#### **Discount**

This is the discount from the full price for which a product was sold at a given location for a given time period.

#### **Last Last Year Sales**

#### **System Forecast**

This is a read-only measures that equals the system baseline plus the system peaks.

#### **System Baseline**

The System Baseline displays the system generated baseline forecast. The values contained in this field are read-only. The system baseline incorporates level, trend, seasonality, but no causal-related information.

#### **What-if Baseline**

In the What-if Parameters view you can change some forecast parameters and see how they impact the forecast. The resulting forecast is stored in this measure. If you like the change, you can run the Copy What-if custom menu, and the forecast is copied in the Adjusted Forecast measure

#### **Adjusted Cumint**

Cumulative Intervals are used in safety stock calculation within allocation and replenishment systems. Its value is similar to a running total of a percentage of the actual forecast and is read-only.

#### **Approved Cumint**

Cumulative Intervals are used in safety stock calculation within allocation and replenishment systems. Its value is similar to a running total of a percentage of the actual forecast and is read-only.

## What-if Parameters View

The What-if Parameters view allows you to adjust some forecast parameters and immediately view the effects on the forecast in the Forecast Results view.

If you like the new adjusted forecast, you first have to Approve the forecast to get the forecast in the approved forecast measure. Next you have to Commit to update the database with the approved forecast as well as with the What-if forecast parameters settings. These parameters are used the next time the forecast batch is run.

Parameters that can be adjusted will affect base demand as well as total forecast.

Figure 5-13 What-if Parameters View

4. What-if Parameters			
	Product	Location	
	1234768 - PL - 1...	1234769 - PL - F...	1234770 - PL - F...
Measure	↑	↑	↑
What-if Forecast Start Date			
What-if Forecast Length			
What-if Forecast End Date			
What-if History Length			
What-if	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
What-if Base Demand	0.00	0.00	0.00
What-if Forecast Length Requested	0	0	0
What-if Forecast Start Date Requested			
What-if History Length Requested			
Copy to Adjusted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Measures: What-if Parameters View**

The What-if Parameters view contains the following measures.

**What-if Forecast Start Date**

This measure lets you specify a different forecast start date than the default used in batch, which is RPAS\_TODAY.

**What-if Forecast Length**

This measure lets you specify a forecast length, which is likely not the default forecast end date less forecast start date used in batch. The value used will be reflected in the Forecast End Date measure.

**What-if Forecast End Date**

This measure displays the date based on the entries in the Forecast Start Date and Forecast Length. Forecast End Date = Forecast Start Date + Forecast Length.

**What-if History Length**

This measure lets you specify the number of periods used to calculate the base demand.

**What-if**

This Boolean measures specifies if the user can perform what-if. If it is unchecked, no what-if is triggered. To perform what-if you need to select at least one of the following measures:

- What-if Forecast Length



- What-if Forecast Start Date
- What-if History Length

If the What-if flag is on, you can run it by clicking on the What-if custom menu.

#### **What-if Base Demand**

This measure displays the value for the base demand based on the new history length.

#### **What-if Forecast Length Requested**

This measure displays the requested forecast length. This is useful, because after running the What-if custom menu, the What-if Forecast Length measure will be blanked out. It is this measure where you keep track of the latest forecast length used.

#### **What-if Forecast Start Date Requested**

This measure displays the requested forecast start date. This is useful, because after running the What-if custom menu, the What-if Forecast Start Date measure will be blanked out. It is this measure where you keep track of the latest forecast start date used.

#### **What-if History Length Requested**

This measure displays the requested history length. This is useful, because after running the What-if custom menu, the What-if History Length measure will be blanked out. It is this measure where you keep track of the latest history length used.

#### **Copy to Adjusted**

After you finish adjusting the parameters, you can either return to reviewing the forecast or you can apply the changes. Enable this measure by selecting the Boolean measure value to true.

## Preprocessing Details View

The Preprocessing Details view shows all necessary information to determine how the loaded sales were transformed into unconstrained demand. You can review the numbers after each step, and also have the possibility to override the total demand. Unconstrained demand is what an item would have sold at a location without the influence of any outside factor. These factors can include:

- Out of stock situations where an item would have likely sold more
- Outliers like fatty fingers or Software bugs
- Promotions that can boost sales
- Weather that can boost or lower sales. Examples include hurricanes for water bottles, or rain for barbecue items.

For details on how the corrections are made refer to the *Oracle Retail AI Foundation Cloud Service User Guide*.

Figure 5-14 Preprocessing Details View

5. Preprocessing Details					
Calendar	All Dimensions		Location		Product
Measure (Default)	< 1006 Chicago		< 1234768 - PL - 100% Columbian Non-Flavored		
Calendar	2/9/2019	2/16/2019	2/23/2019	3/2/2019	3/9/2019
Measure	↑	↑	↑	↑	↑
Depromote Adjustment	0.00	0.00	0.00	0.00	0.00
Outage Adjustment	0.00	0.00	0.00	0.00	0.00
Outlier Adjustment	0.00	0.00	0.00	0.00	0.00
Outage Indicator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Promotion Indicaor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Baseline Sales	212.00	225.00	192.00	156.00	180.00
Historical Discount	0.00	0.00	0.00	0.00	0.00
Historical Event					
Outlier Indicator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Raw Sales	212.00	225.00	192.00	156.00	180.00
Preprocessed Sales	212.00	225.00	192.00	156.00	180.00
User Override	-1.00	-1.00	-1.00	-1.00	-1.00

### Measures: Preprocessing Details View

The Preprocessing Details view contains the following measures.

#### Depromote Adjustment

This measure displays the units that were removed from the historical sales, because they were caused by the lift in demand due to one or more offers.

#### Outage Adjustment

This measure displays the units that were added to the historical sales, because they were caused by the artificial drop in demand due to stockouts.

#### Outlier Adjustment

This measure displays the units that were added to the historical sales, because they were caused by the artificial drop in demand due unusual events, like human error, or extreme bottle water sales during a hurricane.

#### Outage Indicator

This measure is either loaded or calculated by the rules in the custom menu. It is used during the pre-processing run that corrects sales for lost sales.

#### Promotion Indicator

This measure is usually calculated as the **OR** of all available offers that are active for a product/location/calendar combination. It is used during the preprocessing run that removes promotional sales.

#### Baseline Sales

This measure represents the demand that was sold at a location without the influence of any outside factor.

#### **Historical Discount**

This measure displays the units that were removed from the historical sales, because they were caused by the lift in demand due to one or more offers.

When the Historical Discount or Historical Event measures are not blank, it is likely that the Promotion Indicator is On, and the Depromote Adjustment will also have a non-zero value.

#### **Historical Event**

When the Historical Discount or Historical Event measures are not blank, it is likely that the Promotion Indicator is On, and the Depromote Adjustment will also have a non-zero value.

#### **Outlier Indicator**

This measure is either loaded or calculated by the rules in the custom menu. It is used during the pre-processing run that corrects the sales for outliers.

#### **Raw Sales**

This measure is loaded and it represents the historical sales at a product/location/calendar period level. It is different from demand because it may be constrained by stockouts, outliers, weather, and so on.

#### **Preprocessed Sales**

This measure represents the demand – including promotion and offer data that was sold at a product/location/calendar. If configured properly, the stockout and outliers impact is removed.

#### **User Override**

After reviewing all the above measures, this is the place to override the demand at the product/location/calendar level. This can be useful for special cases (introduction of key items) as well as extreme situations when entire departments were hurt by natural events, like a pandemic.

# 6

## IPOCS-Demand Forecasting Administration Task

This chapter describes the IPOCS-Demand Forecasting batch flow management for IPOCS-Demand Forecasting.

### Batch Flow Administration Workspace, Step, and View

The following table lists the workspace, step, and view for the IPOCS-Demand Forecasting Administration task.

**Table 6-1** Batch Flow Administration Workspace, Step, and View

Workspace	Step	View
<a href="#">Batch Flow Administration Workspace</a>	<a href="#">Batch Flow Control Step</a>	<a href="#">Batch Flow Management View</a>

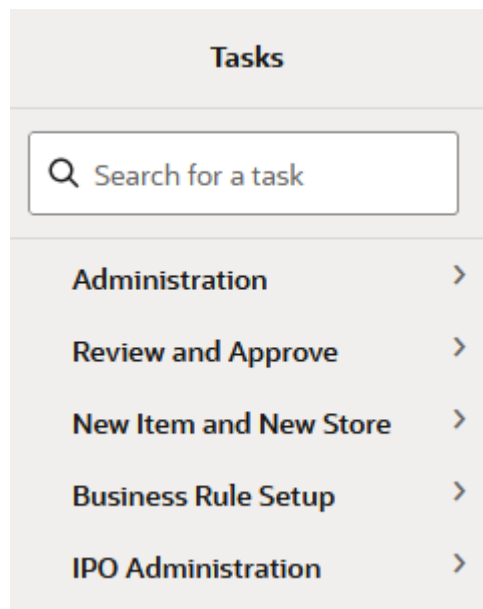
### Batch Flow Administration Workspace

The Batch Flow Administration workspace allows you access to all of the views listed in [Batch Flow Administration Workspace, Step, and View](#).

To build the Batch Flow Administration workspace, perform these steps:

1. From the left sidebar menu, click the Task Module to view the available tasks.

**Figure 6-1** Task Module



2. Click the **IPO Administration** activity and then click **Batch Flow Administration**.

This workbook does not have a wizard. A workbook is being prepared. Successful workspaces are available from the Dashboard.

The Batch Flow Administration workspace is built. This workspace contains this step: [Batch Flow Control Step](#).

## Batch Flow Control Step

This step includes the [Batch Flow Control View](#).

### Batch Flow Control View

This view contains measures that control what steps should be run doing batch. It is information that is passed to the Oracle Administration Task (OAT) within IPOCS. For instance, if in the OAT you select to run forecast, by default the task runs forecast for all available final levels. However, if in the Batch Flow Management you enable Run Forecast 01, and disable Run Forecast for other levels - like 03, the OAT will only run forecast for final level 01.

The reason why some steps may be skipped has to do with the tuning of the system during the implementation. If one step is fine-tuned, for instance selecting the forecast strategy for new items, for the sake of saving time, the implementer may want to skip non-relevant steps, like running forecast for established items.

**Figure 6-2 Batch Flow Control View**

Batch Flow Management	
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Measure (Default)	<input type="checkbox"/>
Measure	
Run NewItem Batch	<input checked="" type="checkbox"/>
Import Inventory Data	<input type="checkbox"/>
Replenish Warehouse	<input checked="" type="checkbox"/>
Import Assortment Period from AP	<input type="checkbox"/>
Import Initial Allocation from AP	<input type="checkbox"/>
Export Purchase Orders and Transfers To RMS	<input type="checkbox"/>
Get Purchase Order Numbers from RMS	<input type="checkbox"/>
Get Transfer Order Numbers from RMS	<input type="checkbox"/>
Recalculate Sales Start Index	<input type="checkbox"/>
Calculate Total Sales from Pos	<input checked="" type="checkbox"/>
Run Forecast 01	<input checked="" type="checkbox"/>
Include New Item Recommendation 01	<input checked="" type="checkbox"/>
Enable GA Business Rules Eligibility 01	<input checked="" type="checkbox"/>
Copy Assortment Start/End Dates	<input type="checkbox"/>

**Measures: Batch Flow Control**

The Batch Flow Control view contains the following measures.

**Export Purchase Order and Transfers to RMS**

If selected, proposed Purchase Orders and Transfers are sent to RMS using web-service calls.

**Get Purchase Order Numbers from RMS**

If selected, Purchase Order Numbers are retrieved from RMS using web-service calls.

**Get Transfer Order Numbers from RMS**

If selected, Transfer Order Numbers are retrieved from RMS using web-service calls.

#### **Run New Item Batch**

If selected, this step calculates the New Item setup. For example, similarities, New Item recommendations, and so on.

#### **Run Forecast**

If selected, the forecast for the selected final levels is generated.

#### **Include New Item Recommendation**

If selected, the forecast for New Items is generated.

#### **Include New Item Eligibility**

#### **Enable GA Business Rules Eligibility**

If selected, this makes sure that only forecastable items are handled by the business rule engine in the approval process. If deselected, the approval rules set up in the business rule engine become invalid. However, you can write custom rules to decide what items should go through the approval process. For instance a rule can be; ***Any item with average sales of less than 1 unit per month is automatically approved.*** The result of the rule should be stored in the Eligible MASK per Rule Group measure. The measure name is:

`rulgeligmask_CF`. For additional details, refer to the *Oracle Retail Inventory Planning Optimization Cloud Service-Demand Forecasting/ Inventory Planning Optimization Cloud Service-Lifecycle Allocation and Replenishment Implementation Guide*.

#### **Primary App to Load Common Data**

This measure indicates which application's batch job should load the common hierarchies like Product, Location and Calendar.

# 7

## Business Rule Engine

This chapter describes the tasks that comprise the Business Rule Engine for IPOCS-Demand Forecasting, including:

- [Attributes Task](#)
- [Business Rule Group Admin Task](#)
- [Business Rule Setup Task](#)

### Attributes Task

This section describes the Attributes task for IPOCS-Demand Forecasting.

### Attributes Workspaces, Steps, and Views

The following table lists the workspaces, steps, and views for the Attributes task.

**Table 7-1 Attributes Workspaces, Steps, and Views**

Workspace	Step	Views
<a href="#">Attributes Workspace</a>	<a href="#">Review Step</a>	<a href="#">Location Attributes View</a> <a href="#">Product Attributes View</a> <a href="#">Product/Location Attributes View</a>

### Attributes Workspace

The Attributes workspace allows you access to all of the views listed in [Attributes Workspaces, Steps, and Views](#).

The Attributes workspace allows you to review attributes that you can use in rules using the Business Rule engine. The attributes can be product specific, like brand or class. They can also be location specific, like store format, or number of stores an item is sold in. Finally, they can be product/location specific, like average sales, or the vendor from where the products were sourced for a specific store.

The attribute data types are:

- **String** - examples are brand, region
- **Date** - examples are store open date, forecast end date
- **Numeric** - examples are historical average sales, coefficient of variance

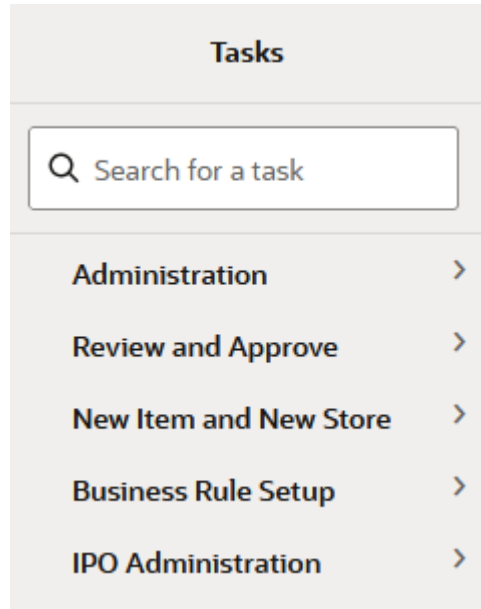
The sources of the attribute information can come from various source. They can be loaded or calculated. IPOCS-Demand Forecasting GA has a set of calculated attributes that can be easily expanded to including any retailer-relevant attributes. For additional technical information on how the attributes are managed, refer to the *Oracle Retail Inventory Planning Optimization Cloud Service-Demand Forecasting / Inventory Planning Optimization Cloud Service-Lifecycle Allocation and Replenishment Implementation Guide*.



To build the Attributes workspace, perform these steps:

1. From the left sidebar menu, click the Task Module to view the available tasks.

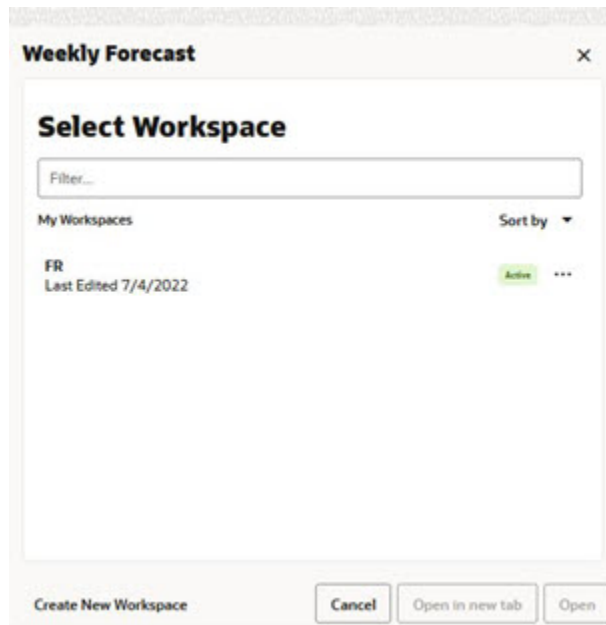
**Figure 7-1 Task Module**



2. Click the **IPO Administration** activity and then click **Attributes Review** to access the available workspaces.
3. Click **Weekly Forecast**. The wizard opens.

You can open an existing workspace, but to create a new workspace, click **Create New Workspace**.

**Figure 7-2 Weekly Forecast Wizard**



- Enter a name for your new workspace in the label text box and click **OK**.

**Figure 7-3 Enter Workspace Label**

The screenshot shows a dialog box titled "Enter Workspace Label" with a close button (X). Below the title is a text input field containing the word "label". To the right of the input field is the word "Required". At the bottom of the dialog are two buttons: "Cancel" and "OK".

- The Workspace wizard opens. Select the locations you want to work with and click **Next**.

**Figure 7-4 Workspace Wizard: Select Locations**

The screenshot shows the "Select Locations" wizard. Under the "Levels & Positions" section, there is a "Company" dropdown menu. Below it is a list of levels: Level, Company, Chain, Area, Region (checked), District, and Store. To the right of this list is a table of location labels with checkboxes:

Label
<input type="checkbox"/> Label
<input type="checkbox"/> 11 Southeastern US
<input type="checkbox"/> 12 Northeastern US
<input type="checkbox"/> 13 Midwest US
<input type="checkbox"/> 14 Northcentral US
<input type="checkbox"/> 15 Southwestern US
<input type="checkbox"/> 31 Eastern Canada
<input type="checkbox"/> 32 Canadian Lakes
<input type="checkbox"/> 33 Western Canada

- Select the products you want to work with and click **Finish**.

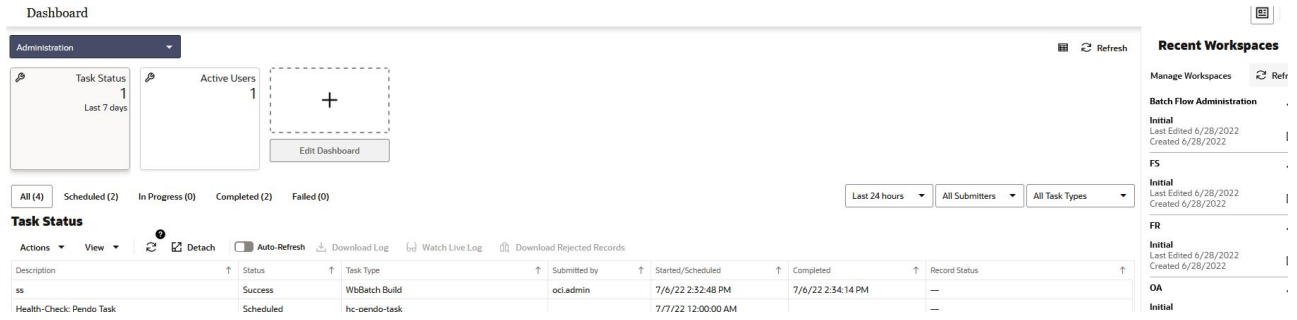
**Figure 7-5 Workspace Wizard: Select Products**

The screenshot shows the "Select Products" wizard. Under the "Levels & Positions" section, there is a "Company" dropdown menu. Below it is a list of levels: Level, Company, Division, Group, Department, Class (checked), Subclass, Grandparent, Parent, and Item. To the right of this list is a table of product labels with checkboxes:

Label
<input type="checkbox"/> Label
<input type="checkbox"/> 1312Casual*
<input type="checkbox"/> 1322Casual*
<input checked="" type="checkbox"/> Coffee
<input type="checkbox"/> Coffee Maker
<input type="checkbox"/> Missy Sweaters
<input type="checkbox"/> Missy Tops

- The wizard notifies you that your workspace is being prepared. Successful workspaces are available from the Dashboard.

**Figure 7-6 Successful Workspace Build**



The Attributes workspace is built. This workspace contains this step:

- [Review Step](#)

## Review Step

The available views are:

- [Location Attributes View](#)
- [Product Attributes View](#)
- [Product/Location Attributes View](#)

## Location Attributes View

The Location Attributes View view allows you to review attributes and their values that are location specific.

**Figure 7-7 Location Attributes View**

The screenshot shows the 'Location Attributes' view. At the top, there's a header 'Location Attributes'. Below it, there are two tabs: 'Business Rule Attribute' (selected) and 'Measure (Default)'. The main area displays a table with columns for 'Business Rule Attribute' and 'Brand'. The table has four rows of measures: 'Measure', 'Location Based Attribute String', 'Location Based Attribute Number' (with a value of 0.00), and 'Location Based Attribute Date'. There are also some navigation and filter icons at the top right.

### Measures: Location Attributes View

The Location Attributes View view contains the following measures.

**Location Based Attribute String**

This measure displays location based attributes that have a string value, such as region, or store format.

**Location Based Attribute Number**

This measure displays location based attributes that have a numeric value, such as number of products carried in a location, or average sales per store.

**Location Based Attribute Date**

This measure displays location based attributes that have a date value, such as a store open date.

## Product Attributes View

The Product Attributes view allows you to review attributes and their values that are product specific.

**Figure 7-8 Product Attributes View**

	Business Rule Attribute	Brand	Class
Product			
1234768 - PL - 100% Columbian Non-Flavored Regular - Ground - 12 oz Can		pl	Coffee
1234769 - PL - French Roast Non-Flavored Regular - Ground - 12 oz Bag		pl	Coffee
1234770 - PL - French Roast Non-Flavored Regular - Whole - 12 oz Bag		pl	Coffee
1234771 - PL - Breakfast Roast Non-Flavored Regular - Whole - 12 oz Bag		pl	Coffee
1234772 - PL - Medium Roast Non-Flavored Regular - Ground - 12 oz Bag		pl	Coffee
1234773 - PL - Dark Roast Non-Flavored Regular - Ground - 12 oz Bag		pl	Coffee
1234774 - PL - French Roast Non-Flavored Decaf - Ground - 12 oz Bag		pl	Coffee

**Measures: Product Attributes View**

The Product Attributes view contains the following measures.

**Product Based Attribute String**

This measure displays product based attributes that have a string value, such as brand, or class.

**Product Based Attribute Number**

This measure displays product based attributes that have a numeric value, such as number of locations carrying an item, or average sales per item.

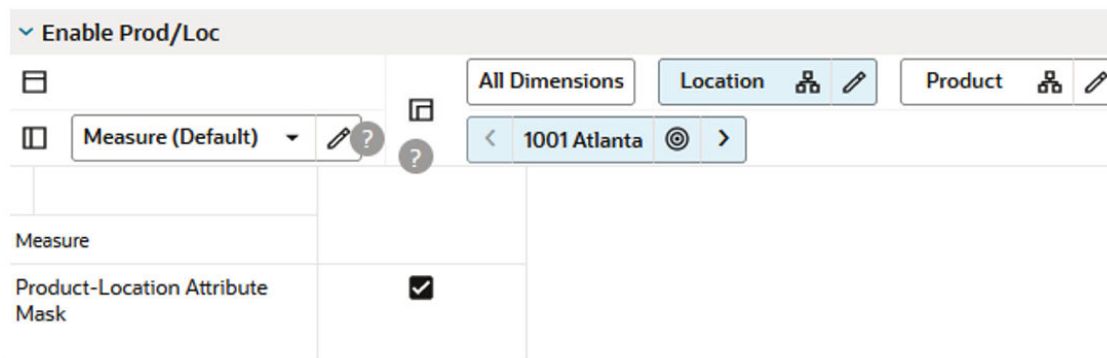
**Product Based Attribute Date**

This measure displays product based attributes that have a date value, such as item start date.

## Enable Prod/Loc View

The Enable Prod/Loc view allows you to enable at the product/location levels.

**Figure 7-9 Enable Prod/Loc View**



### Measures: Enable Prod/Loc View

The Enable Prod/Loc view contains the following measure.

#### Product-Location Attribute Mask

This measure allows you to select product and locations that have relevant attributes. The attributes are displayed and can be edited in the next two steps.

## Business Rule Group Admin Task

This section describes the Business Rule Group Admin task for IPOCS-Demand Forecasting.

### Business Rule Group Admin Workspaces, Steps, and Views

The following table lists the workspaces, steps, and views for the Business Rule Group Admin task.

**Table 7-2 Business Rule Group Admin Workspaces, Steps, and Views**

Workspace	Step	Views
<a href="#">Business Rule Group Admin Workspace</a>	<a href="#">Setup Step</a>	<a href="#">Rule Group Info View</a> <a href="#">Rule Group Active Attribute View</a> <a href="#">Rule Group Scope View</a>

## Business Rule Group Admin Workspace

The Business Rule Group Admin workspace allows you access to all of the views listed in [Business Rule Group Admin Workspaces, Steps, and Views](#).

The Business Rule Group Admin sets up the framework to efficiently use the Business Rule Engine. Here you can enable or disable Rule Groups, or can assign attributes to certain rule

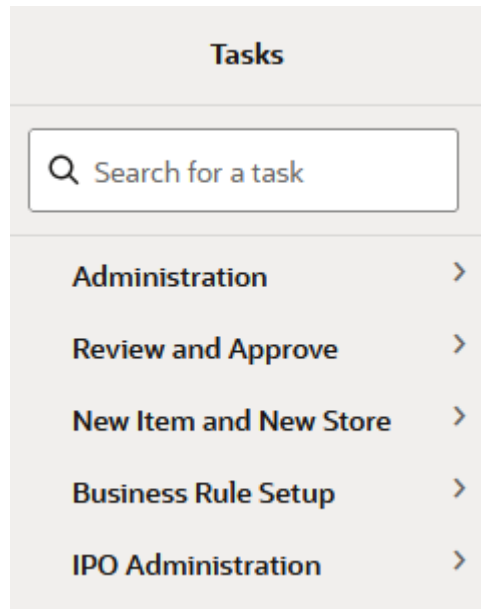
groups. The workspace is not intended to be used by the forecast analyst on a regular basis. It is more for the Administrator of the solution.

The rule groups can have associated certain types of items to them. For instance, Spring fashion items. For these items, you may not want to enable rule groups.

To build the Business Rule Group Admin workspace, perform these steps:

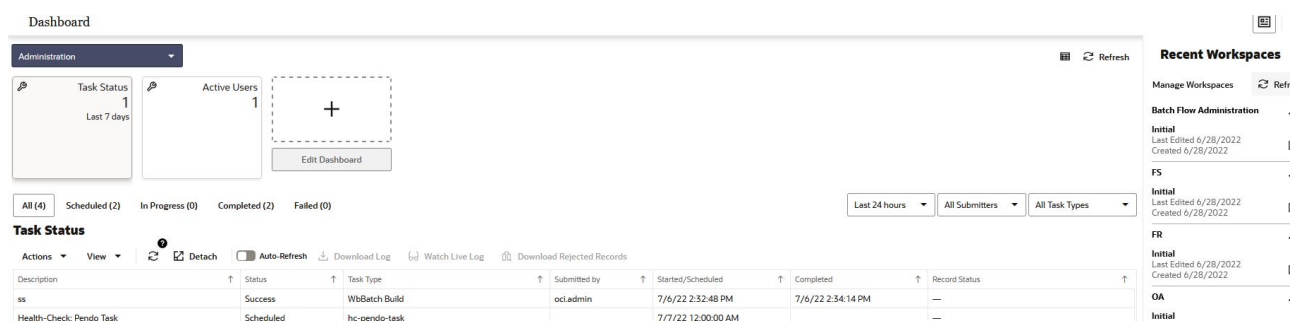
1. From the left sidebar menu, click the Task Module to view the available tasks.

**Figure 7-10 Task Module**



2. Click the **IPO Administration** activity and then click **Demand Forecast** to access the available workspace.
3. Click **Business Rule Group Admin**.
4. There is no wizard for this task. Successful workspaces are available from the Dashboard.

**Figure 7-11 Successful Workspace Build**



The Business Rule Group Admin workspace is built. This workspace contains this step:

- [Setup Step](#)

## Setup Step

The available views are:

- [Rule Group Info View](#)
- [Rule Group Active Attribute View](#)
- [Rule Group Scope \(Weekly Forecast\) View](#)

## Rule Group Info View

The Rule Group Info View view allows you to review attributes and their values that are location specific.

**Figure 7-12 Rule Group Info View**

1. Rule Group Info						
<input type="checkbox"/> Measure (Default) <input type="checkbox"/> Business Rule						
Measure	Rule Group Type	Rule Group Descr...	Priority Lowerbo...	Priority Upperbo...	Enable Rule Group	
	↑↓	↑↓	↑↓	↑↓	↑↓	
Business Rule						
Beverage - Approval	Approval	Beverage -	1.00	100.00	<input checked="" type="checkbox"/>	
Beverage - Navigation	Navigation	Beverage -	1.00	100.00	<input checked="" type="checkbox"/>	
Men's shoes - Approval	Approval	Men's shoes -	201.00	300.00	<input checked="" type="checkbox"/>	
Men's shoes - Navigation	Navigation	Men's shoes -	201.00	300.00	<input checked="" type="checkbox"/>	

### Measures: Rule Group Info View

The Rule Group Info View view contains the following measures.

#### Rule Group Type

In this measure you can assign a type to your rule groups. Available options in GA are:

- **Approval**— assigns business rules to the approval rule groups to decide what product/locations are approved and which need to be reviewed
- **Navigation** — the product/locations that were not approved are assigned to Navigation rule groups and you decide on the priority that they need to be reviewed.
- **Custom**— **Approval** and **Navigation** are very useful in the approval workflow of the solution. However, the scope of the rule groups in the context of the Business Rule Engine can be expanded to many areas.

#### Rule Group Description

This measure allows you to type a meaningful description for each rule group, depending on its purpose.

#### Priority Lowerbound

The rules inside a rule group need to have a priority assigned to them in case of conflicts. This measure sets the lower bound for rule priorities.

### Priority Upperbound

The rules inside a rule group need to have a priority assigned to them in case of conflicts. This measure sets the upper bound for rule priorities.

### Enable Rule Group

This measure allows you to enable rule groups, or disable them if they became out of scope.

## Rule Group Active Attribute View

The Rule Group Active Attribute view allows you to enable attributes for rule groups. The number of attributes can be very high and not all attributes are relevant for all types of merchandise. For instance, you have little use of the flavor attribute when it comes to fashion, or *Neckline* when it comes to hard-line merchandise.

Once you know what type of merchandise is associated with every rule group, you can decide what attributes is relevant to each rule group. This makes the workflow around the business rules more efficient and user friendlier.

**Figure 7-13 Rule Group Active Attribute View**

Business Rule	Beverage - Appro...	Beverage - Navig...
Business Rule Attribute		
Brand	<input type="checkbox"/>	<input type="checkbox"/>
Brand Tier	<input type="checkbox"/>	<input type="checkbox"/>
Channel	<input type="checkbox"/>	<input type="checkbox"/>
Class	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Collar	<input type="checkbox"/>	<input type="checkbox"/>
Color	<input type="checkbox"/>	<input type="checkbox"/>
Department	<input type="checkbox"/>	<input type="checkbox"/>

### Measures: Rule Group Active Attribute View

The Rule Group Active Attribute view contains the following measure.

#### Rule Group Active Attribute

This measure allows you to select the attributes relevant for every rule group.

## Rule Group Scope (Weekly Forecast) View

The Rule Group Scope (Weekly Forecast) view allows you to define the scope of a rule group in terms of what product/locations may be associated with it.



**Figure 7-14 Rule Group Scope (Weekly Forecast) View**

	Location	AK	Catalog	e-Commerce	Great Lakes Region
Product					
Espresso Coffee Maker		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ground		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Instant		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
K Cup Coffee		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Measures: Rule Group Scope View**

The Rule Group Active Attribute view contains the following measure.

**Rule Group Scope**

In this measure you can assign products and locations to certain rule groups.

## Business Rule Setup Task

This section describes the Business Rule Setup for IPOCS-Demand Forecasting.

### Business Rule Setup Workspaces, Steps, and Views

The following table lists the workspaces, steps, and views for the Business Rule Setup task.

**Table 7-3 Business Rule Setup Workspaces, Steps, and Views**

Workspace	Step	Views
Business Rule Setup Weekly Forecast Workspace	Setup Step	<a href="#">Rule Enable View</a> <a href="#">Rule Condition Setup View</a> <a href="#">Rule Membership View</a> <a href="#">Parameters for Approval View</a> <a href="#">Parameters for Navigation View</a>

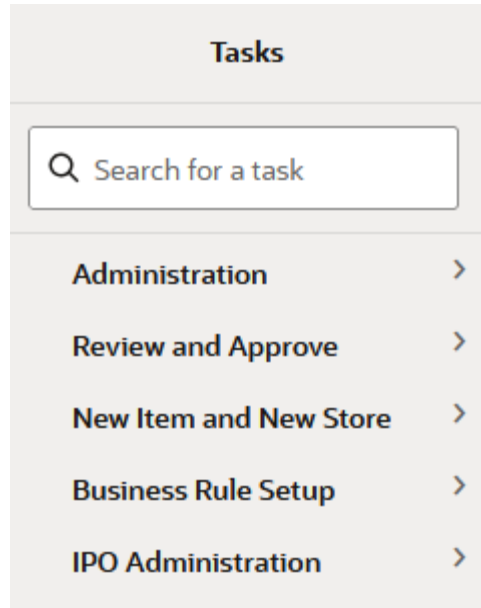
## Business Rule Setup Weekly Forecast Workspace

The Business Rule Setup sets up the framework to efficiently use the Business Rule Engine. Here you can enable or disable Rule Groups, or can assign attributes to certain rule groups. The workspace is not intended to be used by the forecast analyst on a regular basis. It is intended for an Administrator for br-engine.fm.

To build the Business Rule Setup workspace, perform these steps:

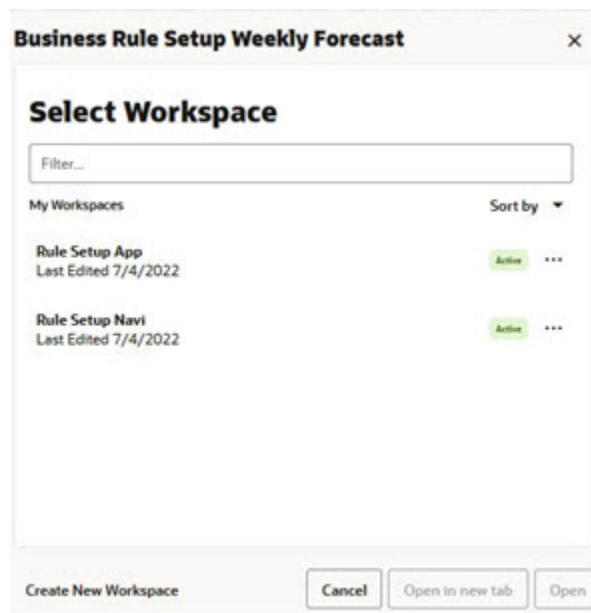
1. From the left sidebar menu, click the Task Module to view the available tasks.

Figure 7-15 Task Module



2. Click the **Business Rule Setup** activity to access the available workspaces.
3. Click **Rule Setup**. The wizard opens.  
You can open an existing workspace, but to create a new workspace, click **Create New Workspace**.

Figure 7-16 Wizard



4. Enter a name for your new workspace in the label text box and click **OK**.

Figure 7-17 Enter Workspace Label

5. The Workspace wizard opens. Select the Business Rule Group type you want to work with. It is important to click only one of the available options, otherwise you will get a warning and cannot proceed to the next step. Click **Next**.

Figure 7-18 Workspace Wizard: Select Business Rule Group Type

## Select Business Rule Group Type

### Levels & Positions

Final Level		Label	
<input type="checkbox"/>	Level	<input type="checkbox"/>	Label
<input type="checkbox"/>	Final Level	<input type="checkbox"/>	Approval
<input checked="" type="checkbox"/>	Business Rule Group Type	<input checked="" type="checkbox"/>	Navigation

6. Select the Business Rule Groups you want to work with and click **Next**.

Figure 7-19 Workspace Wizard: Select Business Rule Groups

## Select Business Rule Group

### Levels & Positions

Business Rule Group		Label	
<input checked="" type="checkbox"/>	Level	<input type="checkbox"/>	Label
<input checked="" type="checkbox"/>	Business Rule Group	<input checked="" type="checkbox"/>	Beverage - Navigation
		<input type="checkbox"/>	Men's shoes - Navigation

7. Select the products you want to work with and click **Next**.

Figure 7-20 Workspace Wizard: Select Products

### Select Products

Levels & Positions

Company	Label
<input type="checkbox"/> Level	<input type="checkbox"/> Label
<input type="checkbox"/> Company	<input type="checkbox"/> 1312Casual*
<input type="checkbox"/> Division	<input type="checkbox"/> 1322Casual*
<input type="checkbox"/> Group	<input checked="" type="checkbox"/> Coffee
<input type="checkbox"/> Department	<input type="checkbox"/> Coffee Maker
<input checked="" type="checkbox"/> Class	<input type="checkbox"/> Missy Sweaters
<input type="checkbox"/> Subclass	<input type="checkbox"/> Missy Tops
<input type="checkbox"/> Grandparent	
<input type="checkbox"/> Parent	
<input type="checkbox"/> Item	

8. Select the locations you want to work with and click **Finish**.

Figure 7-21 Workspace Wizard: Select Locations

### Select Locations

Levels & Positions

Company	Label
<input type="checkbox"/> Level	<input type="checkbox"/> Label
<input type="checkbox"/> Company	<input type="checkbox"/> 11 Southeastern US
<input type="checkbox"/> Chain	<input type="checkbox"/> 12 Northeastern US
<input type="checkbox"/> Area	<input type="checkbox"/> 13 Midwest US
<input checked="" type="checkbox"/> Region	<input type="checkbox"/> 14 Northcentral US
<input type="checkbox"/> District	<input type="checkbox"/> 15 Southwestern US
<input type="checkbox"/> Store	<input type="checkbox"/> 31 Eastern Canada
	<input type="checkbox"/> 32 Canadian Lakes
	<input type="checkbox"/> 33 Western Canada

9. The wizard notifies you that your workspace is being prepared. Successful workspaces are available from the Dashboard.

Figure 7-22 Successful Workspace Build

The screenshot shows the Oracle Business Rule Setup Dashboard. At the top, there's a 'Dashboard' header and a navigation menu with 'Administration' selected. Below this, there are two summary cards: 'Task Status' (1 task, Last 7 days) and 'Active Users' (1 user). A dashed box with a plus sign and 'Edit Dashboard' button is visible. Below the summary cards, there are filters for 'All (4)', 'Scheduled (2)', 'In Progress (0)', 'Completed (2)', and 'Failed (0)'. On the right, there are filters for 'Last 24 hours', 'All Submitters', and 'All Task Types'. The main section is titled 'Task Status' and contains a table with columns: Description, Status, Task Type, Submitted by, Started/Scheduled, Completed, and Record Status. The table shows one task: 'Health-Check: Pendo Task' with status 'Scheduled', task type 'hc-pendo-task', submitted by 'oci.admin', started on '7/7/22 12:00:00 AM', and completed on '7/6/22 2:34:14 PM'. On the right sidebar, there's a 'Recent Workspaces' section with a 'Manage Workspaces' button and a list of workspace entries, including 'Batch Flow Administration' and 'Initial'.

The Business Rule Group Admin workspace is built. This workspace contains this step:

- [Setup Step](#)

## Setup Step

The available views are:

- [Rule Enable View](#)
- [Rule Condition Setup View](#)
- [Rule Membership View](#)
- [Parameters for Approval View](#)
- [Parameters for Navigation View](#)

## Rule Enable View

The Rule Enable view allows you to review attributes and their values that are location specific.

**Figure 7-23 Rule Enable View**

Measure	Enable	Priority	Start Date	End Date	Rule Description	Rule On/Off
high volume	<input checked="" type="checkbox"/>	1.00			high volume	<input checked="" type="checkbox"/>
low volume	<input checked="" type="checkbox"/>	2.00			low volume	<input checked="" type="checkbox"/>

### Measures: Rule Enable View

The Rule Enable view contains the following measures.

#### Enable

In this measure you can enable or disable the rule. Note that although you decide to enable the rule, other factors also need to hold true. For instance the time you want to enable the rule needs to be within the start and end dates.

#### Priority

The rule conditions used to assign product/locations may result in product/locations been assigned to more than one rule. The rule priority decides which rule takes precedence. A lower number denotes a higher priority.

#### Start Date

The date when the rule becomes active. Rarely used in IPOCS-Demand Forecasting, but may be very helpful for planning or replenishment solutions.

#### End Date

The date when the rule stops being active. Rarely used in IPOCS-Demand Forecasting, but may be very helpful for planning or replenishment solutions.

#### Rule Description

Here you can enter a description for a rule. For instance if a rule condition is to check for high sellers with stable demand, the rule description could be: **High demand / low variability**.

**Rule On/Off**

This measure displays the status of a rule.

**Rule Condition Setup View**

The Rule Condition Setup view allows you to assign items to business based on the conditions you specify.

For the purpose of reviewing the forecast, you may want to group together key items as well as high sellers.

Examples of rule conditions can include:

- If an item is a key item and recent sales are larger than 50 items per week, then group together
- Group all coffee items together, except for private label.
- If class is Coffee and brand is not Private Label, then group together.

IPOCS-Demand Forecasting GA has up to four conditions per rule. How to change this, and for more examples and technical details, refer to the *Oracle Retail Inventory Planning Optimization Cloud Service-Demand Forecasting / Inventory Planning Optimization Cloud Service-Lifecycle Allocation and Replenishment Implementation Guide*, as well as the [Appendix: Business Rule Engine](#).

**Figure 7-24 Rule Condition Setup View**

2. Rule Condition Setup															
Business Rule	Rule Condition	Measure	Attribute Selected	Condition Group	Between Condition and/or	Condition Operator	Condition Order	Condition Value (string)	Condition Value (numeric)	Condition Value (Date)	Condition Value (Measure)	Condi... Error String	Total Eligible Items	Condition Count	Rule Count
high vol...	condition 01		Recent Average	1	OR	>=	1		200.00				1802	0	
	condition 02		HighPriority	1			2						1802	0	

**Measures: Rule Condition Setup View**

The Rule Condition Setup view contains the following measures.

**Attribute Selected**

This measure allows you to select the attribute for the condition. The attributes for the rule are assigned in the Attributes workspace.

**Condition Group**

Condition groups allow you to refine the criteria that define a rule. Conditions inside the groups are evaluated first. Finally, the rule is the result of the evaluation of all groups that make it up.

Figure 7-25 shows an example of how Condition Orders and Condition Groups are evaluated to create a rule.

The rule is made up of four conditions, which belong to the two groups. The evaluation occurs in the following sequence:

- Condition Group 1 is the result of Condition 1 AND Condition 2
- Condition Group 2 is the result of Condition 3 AND Condition 4

- The Rule is the evaluation of the results of Condition Group 1 AND Condition Group 2

The operator between groups is given by the between Condition of Condition 2, which in this case links the two groups.

**Figure 7-25 Example of How Condition Orders and Condition Groups are Evaluated to Create a Rule**

Rule	Condition Group	Condition Order	Between Condition
Condition 1	1	1	AND
Condition 2	1	2	AND
Condition 3	2	3	OR
Condition 4	2	4	

#### Between Condition AND/OR

If multiple conditions are set up for a rule, this measure allows you to specify if the operator is **AND**, or **OR**.

#### Condition Operator

This measure compares the attribute value with a condition value.

**Table 7-4 Condition Operators**

Possible Operators	Descriptions	Example
==	Checks if the attribute value is equal with the Condition Value	brand == Private Label
!=	Checks if the attribute value is different from the Condition Value	average sales != 0
>	Checks if the attribute value is larger than the Condition Value	Average sales >5
>=	Checks if the attribute value is larger or equal to the Condition Value	
<	Checks if the attribute value is less than the Condition Value	Standard deviation of sales <6
<=	Checks if the attribute value is less or equal to the Condition Value	
contain		
not contain		
match		
not match		

#### Condition Order

The condition order specifies in which sequence to evaluate conditions to create a rule.

#### Condition Value (string)

This measure is used when the type of the attribute is a string. Example: `brand == Private Label`

#### Condition Value (numeric)

This measure is used when the type of the attribute is numeric. Example: `average sales > 10`

#### Condition Value (Date)

This measure is used when the type of the attribute is a date. Example: `today >= 02/30/2024"`

#### Condition Value (Measure)

This measure is used when you want to refine the condition value. For instance, for coffee items, except Private Label, you want to assign items to the rule that sell more than 50 per week. For Private Label items you may want the value to be 100.

You need to populate your Condition measure with a value of 100 for all Private Label items, and the rest of the coffee items with 100.

#### Condition Error String

In case an error occurs, this measure displays the reason. For instance, an attribute was of type string, and was compared to a Condition Value of type date.

#### Total Eligible Items

Total number of items that are brought in the workspace and are eligible to be managed using business rules.

#### Condition Count

Number of items that are attached to each condition.

#### Rule Count

Number of items that are filtered to each rule.

## Business Rule Process

Perform the following steps to run the business rules.

1. Once the conditions are setup, click **Calculate**. Then run the custom menu **Validate Rule Setup**. If any rules were set up incorrectly, a message appears in the Condition Error measure.
2. Correct the conditions until the error message no longer appears.
3. Run the **Assign Membership** custom menu. This runs the conditions in the rules, and assigns product/locations to the designated rules.
4. To make sure that conditions and assignments are successful, check the **Condition Count** and **Rule Count** measures. They show you how many product/locations are assigned to each rule. Once you see the count and membership you can commit and after running the batch the business rules will take effect.

## Rule Membership View

The Rule Membership view displays the condition and rule a product/location is assigned to.



**Figure 7-26 Rule Membership View**

Business Rule	Rule Condition	Product
high volume	condition 01	<input type="checkbox"/>
	condition 02	<input type="checkbox"/>
	condition 03	<input type="checkbox"/>
	condition 04	<input type="checkbox"/>
low volume	condition 01	<input type="checkbox"/>
	condition 02	<input type="checkbox"/>
	condition 03	<input type="checkbox"/>
	condition 04	<input type="checkbox"/>

**Measures: Rule Membership View**

The Rule Membership view contains the following measures.

**Rule Membership**

This measure displays what rule a certain product/location is assigned to.

**Condition Membership**

This measure displays what condition a certain product/location is assigned to.

**Parameters for Approval View**

The Parameters for Approval view allows you to manage the approval exception setting based on the business rules you set up. For instance, if a rule has assigned high margin items, you may want to tighten the Error threshold, to make sure the forecast is in line with your expectations.

**Figure 7-27 Parameters for Approval View**

4. Parameters for Approval						
Measure	Alert - Average S...	Alert - Calculatio...	Alert - Error Thre...	Approval Method...	Alert - Causal Pe...	
Business Rule						
high volume	-1.00	-1	0.25	Last Year Sales	-1.00	
low volume	-1.00	-1	0.35	Recent Sales vs	-1.00	

### Measures: Parameters for Approval View

The Parameters for Approval view contains the following measures.

#### Approval Method at Rule

This field is a list from which you select the default automatic approval policy for forecast items. Valid values are:

- Manual**  
 The system-generated forecast is not automatically approved. Forecast values must be manually approved by accessing and amending the Forecast Review view
- Automatic**  
 The system-generated quantity is automatically approved as is.
- By Alert**  
 This list of values may also include any Forecast Approval alerts that have been configured for use in the forecast approval process. Alerts are configured during the implementation and can be enabled to be used for Forecast Approval in the Enable Alert for Forecast Approval view. Refer to the *Oracle Retail Predictive Application Server Configuration Tools User Guide* for more information on alerts. The Alert Parameters view contains a list and descriptions of available alerts, and for which level (causal/baseline) that they are designed for.

#### Alert - Average Sales Threshold at Rule

Threshold used in deciding if average sales are high or low, depending on how they compare against the value. It overrides the values set up in the Forecast Setup workspace.

#### Alert - Calculation Periods at Rule

The number stored in this field defines the number of calculations periods used in generating exceptions. It overrides the values set up in the Forecast Setup workspace.

#### Alert - Error Threshold at Rule

This field stores the value that determines if a forecast error is acceptable, or if it needs to be flagged as exception. It overrides the values set up in the Forecast Setup workspace.

#### Alert - Causal Peak Factor at Rule

This measure is relevant for promotional forecasting. The current forecast values are divided by the maximum historical demand. If the result is larger than the value of this measure, the forecast may be too large and an exception is triggered. It overrides the values set up in the Forecast Setup workspace.

## Parameters for Navigation View

The Parameters for Navigation view allows setup for what forecasts are approved and which ones need review

The forecast approval process is two prong.

- First, you set up business to decide what forecasts are approved and which ones need review.

The setup occurs in the [Rule Condition Setup View](#) and the [Parameters for Navigation View](#). After the batch is run, there will be a pool of approved product/locations, and a pool of product/locations that need review. However, not all product/locations in this pool have the same criticality.

- Secondly, navigation exceptions come in the picture.

The unapproved product/locations are run thru the business rules for navigations and assigned to different navigation buckets.

For instance, key items and high margin items will always be **Urgent**. High sellers, but lower value can be **Required**. The next tier can be **Optional**.

Finally, unapproved product/locations that are not as important for the business as the ones already assigned to the top tiers can be assigned to **Informational**.

**Figure 7-28 Parameters for Navigation View**

Measure	Navigation Bucke...
Business Rule	↑
1. Urgent	1. Urgent
2. Required	2. Required
3. Optional	3. Optional
4. Informational	4. Informational

### Measures: Parameters for Navigation View

The Parameters for Navigation view contains the following measure.

#### Navigation Buckets at Rule

In this measure you assign the product/locations assigned to the navigation business rules to the Navigation Buckets, which represent the urgency they need review.

# 8

## Offer Analysis Task

This chapter describes the Offer Analysis task for IPOCS-Demand Forecasting.

### Offer Analysis Workspaces, Steps, and Views

The following table lists the workspaces, steps, and views for the Offer Analysis task.

**Table 8-1 Offer Analysis Workspaces, Steps, and Views**

Workspace	Step	Views
<a href="#">Offer Analysis Workspace</a>	<a href="#">Offer Analysis Step</a>	<a href="#">Summary View</a> <a href="#">Detailed View</a>

### Offer Analysis Workspace

The Offer Analysis workspace allows you access to all of the views listed in [Offer Analysis Workspaces, Steps, and Views](#).

It allows you to review how certain events have performed historically. The current promotion model consists of campaigns, which are a collection of promotions. Each promotion has one or more active offers.

Examples of this event structure are listed in the following table.

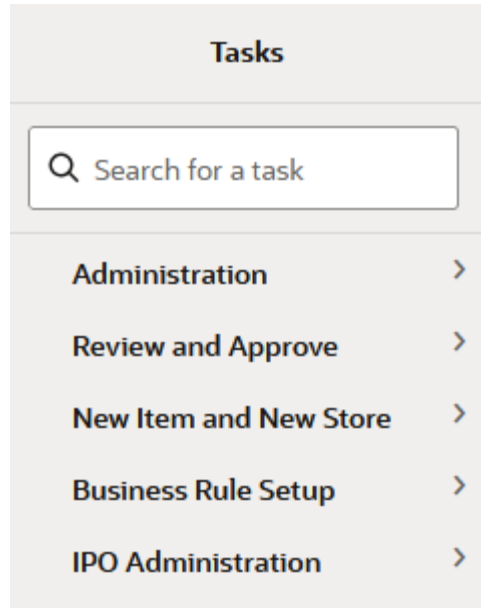
Campaign	Promotions	Offers
Winter 2024	TV Ad December	Multiple Buys Gift with purchase
	Price Discount February	Buy One Get One 20% off any collection

The information is useful to review at any of these levels, but it is at the offer level where the impact on demand is quantified inside the forecast engine. It is then aggregated across offers to present the data per promotion, and across promotions to see how well the campaign did. All information in this workbook is historical. Offer information for the forecast (as it impacts future demand) is presented in the Forecast Review workbook. When reviewing the forecast, you can select how similar offers performed in the past and include additional information for the approval process in addition to the business rules set up for exception management.

To build the Offer Analysis workspace, perform these steps:

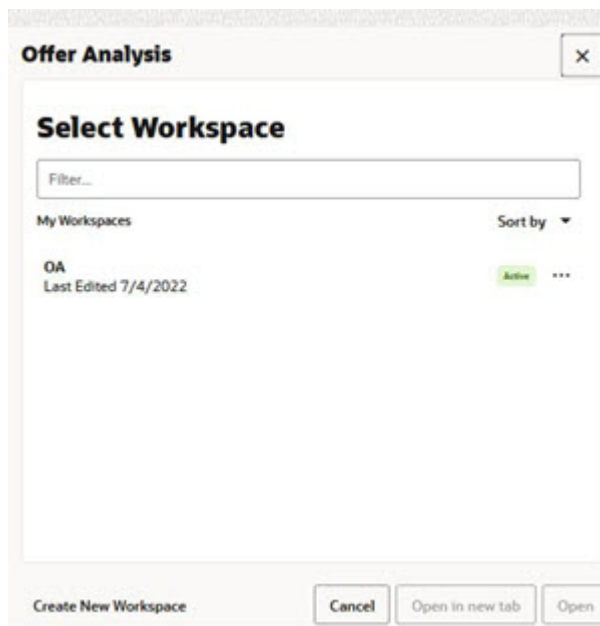
1. From the left sidebar menu, click the Task Module to view the available tasks.

Figure 8-1 Task Module



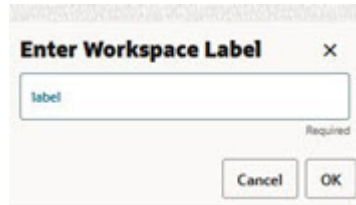
2. Click the **Review and Approve** activity and then click **Promotion Analysis** to access the available workspaces.
3. Click **Promotion Analysis**. The wizard opens.  
You can open an existing workspace, but to create a new workspace, click **Create New Workspace**.

Figure 8-2 Offer Analysis Wizard



4. Enter a name for your new workspace in the label text box and click **OK**.

Figure 8-3 Enter Workspace Label



5. The Workspace wizard opens. Select the items you want to work with and click **Next**.

Figure 8-4 Workspace Wizard: Select Items

## Select Offer

### Levels & Positions

Campaign Alias	
<input type="checkbox"/>	Level
<input type="checkbox"/>	Campaign Alias
<input type="checkbox"/>	Campaign
<input checked="" type="checkbox"/>	Promo
<input checked="" type="checkbox"/>	Offer

6. The Workspace wizard opens. Select the locations you want to work with and click **Next**.

Figure 8-5 Workspace Wizard: Select Locations

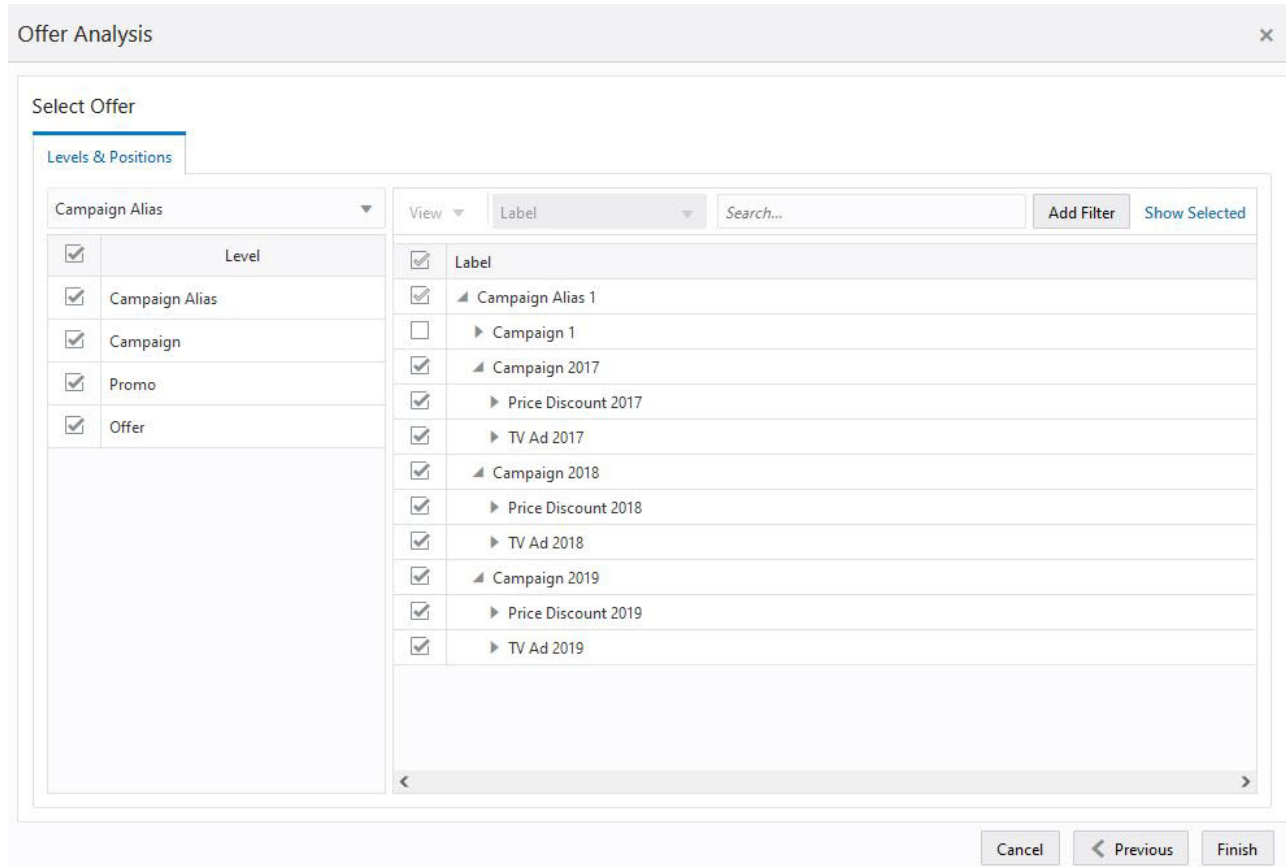
## Select Locations

### Levels & Positions

Company	Label
<input type="checkbox"/> Level	<input type="checkbox"/> Label
<input type="checkbox"/> Company	<input type="checkbox"/> 11 Southeastern US
<input type="checkbox"/> Chain	<input type="checkbox"/> 12 Northeastern US
<input type="checkbox"/> Area	<input type="checkbox"/> 13 Midwest US
<input checked="" type="checkbox"/> Region	<input type="checkbox"/> 14 Northcentral US
<input type="checkbox"/> District	<input type="checkbox"/> 15 Southwestern US
<input type="checkbox"/> Store	<input type="checkbox"/> 31 Eastern Canada
	<input type="checkbox"/> 32 Canadian Lakes
	<input type="checkbox"/> 33 Western Canada

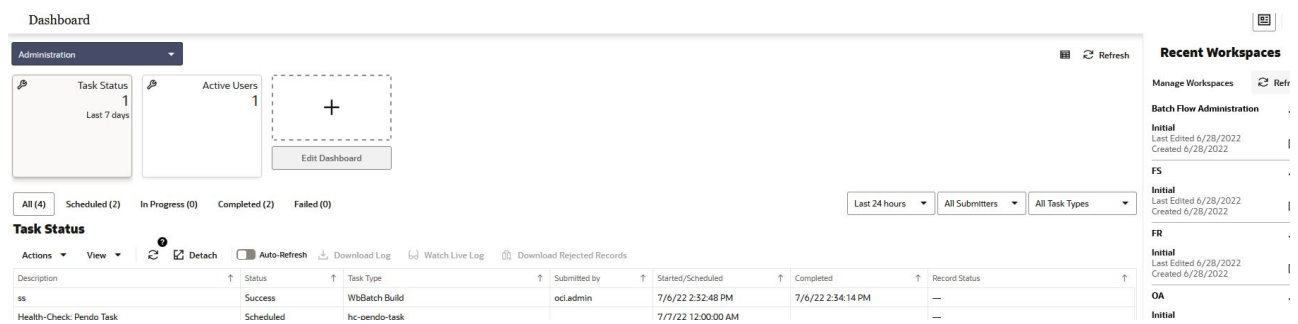
7. Select the offers you want to work with and click **Finish**.

Figure 8-6 Workspace Wizard: Select Offers



- The wizard notifies you that your workspace is being prepared. Successful workspaces are available from the Dashboard.

Figure 8-7 Successful Workspace Build



The Offer Analysis workspace is built. This workspace contains this step:

- Offer Analysis Step

## Offer Analysis Step

The available views are:

- [Summary View](#)
- [Detailed View](#)

## Summary View

The Summary view allows you to review campaign/promo/offer data at a level in the product and location hierarchies that is higher than item/store. For a more detailed look, the same measures presented in this view can be reviewed in the [Detailed View](#).

**Figure 8-8 Summary View**

Product	Offer	Measure	Baseline Sales U...	Markdown Sales ...	Offer Sales Units	Reward Type	Effective Discount	Offer Start Date	Offer End Date	Offer Length	Product Count	Location Count
Ground	Buy One Get One		128,272,277	0	41,785	percent off	31.76%	05/20/2019	09/20/2019	123	49	5
	Gift With Purchase		128,272,277	0	77,065	amount off	32.14%	06/20/2019	10/20/2019	122	49	5
	Multiple Buys		128,272,277	0	33,700	fixed price	27.07%	07/20/2019	11/20/2019	123	49	5

### Measures: Summary View

The Summary view contains the following measures.

#### Baseline Sales Units

This measure displays the sales units that would have been sold during the offer period if no reward was active.

#### Markdown Sales Units

This measure displays clearance units sold during the offer period.

#### Offer Sales Units

This measure displays the additional sales units sold during the offer period due to the offer reward.

#### Reward Type

This measure displays the mechanism used during the offer period to drive additional demand. The reward types available are:

- **Percent off:** Price discount from the original price. Let's say the original price is \$9.99, and the discount is 15%. During the offer the price at which items were sold is \$8.49
- **Amount off:** Amount off from the original price. Let's say the original price is \$9.99 and the amount off is \$2. During the offer the price at which items were sold is \$7.99.
- **Fixed price:** The price at which an item was sold. No matter what the original price is, the fixed price is what the items were sold for.

#### Effective Discount

This measure displays the actual discount offered during the offer period, no matter what the reward type was. This is a very important metric, since it is probably the main driver of the additional demand produced during an offer. It is also not always trivial to calculate. For example, for a Buy One Get One Free offer one would think the discount is 50%. However, not everybody buys an even number of items, even when this offer is active. This will actually lower the effective discount to be less than 50%.



**Offer Start Date**

This measure displays the date when the offer period started. This measure is displayed at an aggregate level, and let us say that some stores have different offer start dates, due to different weather in their geographic location. The date displayed is the earliest of the available dates.

**Offer End Date**

This measure displays the date when the offer period ended. This measure is displayed at an aggregate level, and let us say that some stores have different offer start dates, due to different weather in their geographic location. The date displayed is the latest of the available dates.

**Offer Length**

This measure displays the number of dates the offer was active. It is the number of days between the offer end and start dates.

**Product Count**

This measure displays how many items were part of the offer.

**Location Count**

This measure displays how many stores were part of the offer.

## Detailed View

The Detailed view has the exact same metrics as the [Summary View](#). The difference is that the Detailed view has the information displayed at the item/store level, while the [Summary View](#) shows it at a higher level in the product and location hierarchies.

# 9

## Attribute Review Task

This chapter describes the Attribute Review task for IPOCS-Demand Forecasting and IPOCS-Lifecycle Allocation and Replenishment.

### Attribute Review Workspaces, Steps, and Views

The following table lists the workspaces, steps, and views for the Attribute Review task.

**Table 9-1 Attribute Review Workspaces, Steps, and Views**

Workspace	Steps	Views
Attributes Review Workspace	Label & Setup Step	Enable Prod/Loc View Label & Setup View
	Review Step	Location Attributes View Product Attributes View Product/Location Attributes View
	Edit Step	Location Attributes View Product Attributes View Product/Location Attributes View

### Attributes Review Workspace

The Attributes Review workspace allows you access to all of the views listed in [Attributes Review Workspaces, Steps, and Views](#).

The Attribute Review workspace allows you to review attributes that you can use in rules using the Business Rule engine. The attributes can be product specific, like brand or class. They can also be location specific, like store format, or number of stores an item is sold in. Finally, they can product/location specific, like average sales, or the vendor from where the products were sourced for a specific store.

The attribute data types are:

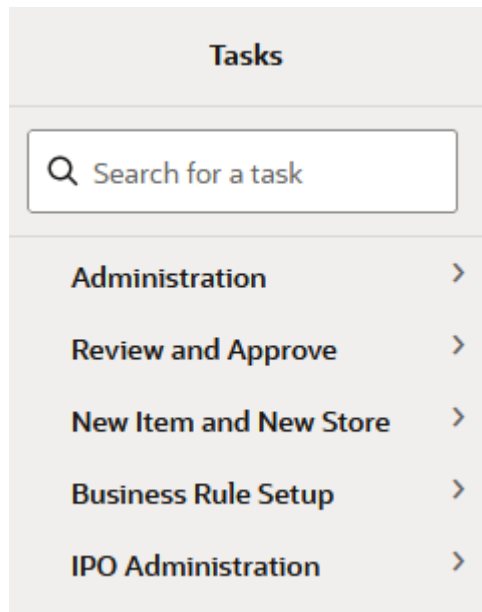
- **String** - examples are brand, region
- **Date** - examples are store open date, forecast end date
- **Numeric** - examples are historical average sales, coefficient of variance

The sources of the attribute information can come from various source. They can be loaded or calculated. IPOCS-Demand Forecasting GA has a set of calculated attributes that can be easily expanded to including any retailer-relevant attributes. For additional technical information on how the attributes are managed, refer to the *Oracle Retail Inventory Planning Optimization Cloud Service-Demand Forecasting / Inventory Planning Optimization Cloud Service-Lifecycle Allocation and Replenishment Implementation Guide*.

To build the Attribute Review workspace, perform these steps:

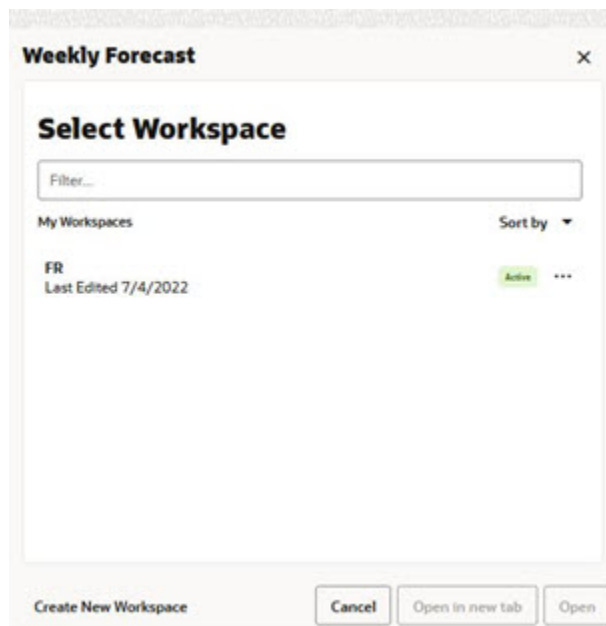
1. From the left sidebar menu, click the Task Module to view the available tasks.

**Figure 9-1 Task Module**



2. Click the **IPO Administration** activity and then click **Attributes Review** to access the available workspaces.
3. Click **Weekly Forecast**. The wizard opens.  
You can open an existing workspace, but to create a new workspace, click **Create New Workspace**.

**Figure 9-2 Weekly Forecast Wizard**



4. Enter a name for your new workspace in the label text box and click **OK**.

Figure 9-3 Enter Workspace Label

5. The Workspace wizard opens. Select the locations you want to work with and click **Next**.

Figure 9-4 Workspace Wizard: Select Locations

Levels & Positions	Label
<input type="checkbox"/> Level	<input type="checkbox"/> Label
<input type="checkbox"/> Company	<input type="checkbox"/> 11 Southeastern US
<input type="checkbox"/> Chain	<input type="checkbox"/> 12 Northeastern US
<input type="checkbox"/> Area	<input type="checkbox"/> 13 Midwest US
<input checked="" type="checkbox"/> Region	<input type="checkbox"/> 14 Northcentral US
<input type="checkbox"/> District	<input type="checkbox"/> 15 Southwestern US
<input type="checkbox"/> Store	<input type="checkbox"/> 31 Eastern Canada
	<input type="checkbox"/> 32 Canadian Lakes
	<input type="checkbox"/> 33 Western Canada

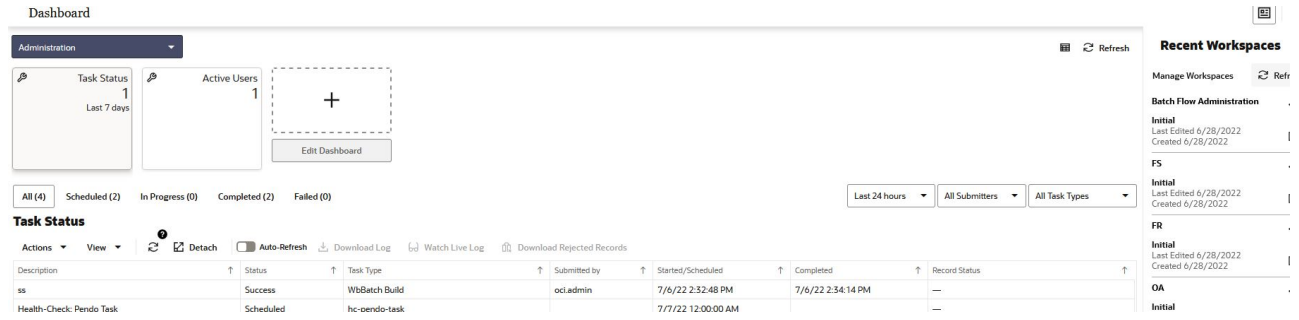
6. Select the products you want to work with and click **Finish**.

Figure 9-5 Workspace Wizard: Select Products

Levels & Positions	Label
<input type="checkbox"/> Level	<input type="checkbox"/> Label
<input type="checkbox"/> Company	<input type="checkbox"/> 1312Casual*
<input type="checkbox"/> Division	<input type="checkbox"/> 1322Casual*
<input type="checkbox"/> Group	<input checked="" type="checkbox"/> Coffee
<input type="checkbox"/> Department	<input type="checkbox"/> Coffee Maker
<input checked="" type="checkbox"/> Class	<input type="checkbox"/> Missy Sweaters
<input type="checkbox"/> Subclass	<input type="checkbox"/> Missy Tops
<input type="checkbox"/> Grandparent	
<input type="checkbox"/> Parent	
<input type="checkbox"/> Item	

7. The wizard notifies you that your workspace is being prepared. Successful workspaces are available from the Dashboard.

**Figure 9-6 Successful Workspace Build**



The Attributes Review workspace is built. This workspace contains this step:

- [Label & Setup](#)
- [Review Step](#)
- [Edit Step](#)

## Label and Setup Step

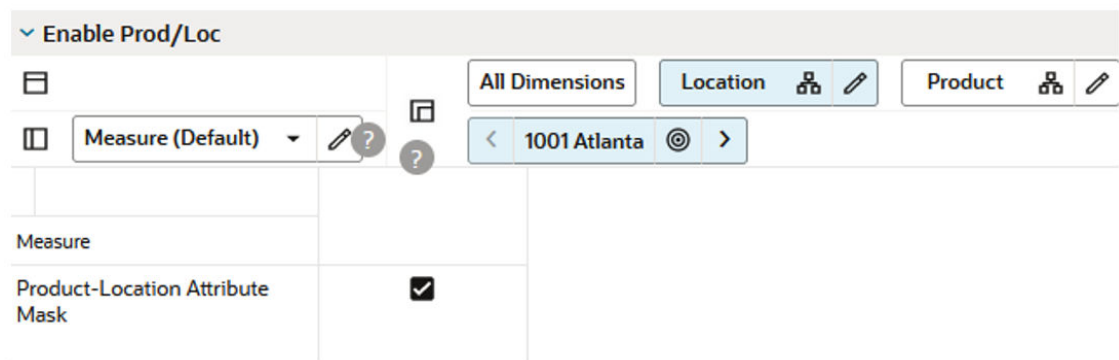
The available views are:

- [Enable Prod/Loc View](#)
- [Label and Setup View](#)

## Enable Prod/Loc View

The Enable Prod/Loc view allows you to enable attributes at the product/location levels.

**Figure 9-7 Enable Prod/Loc View**



### Measures: Enable Prod/Loc View

The Enable Prod/Loc view contains the following measure.

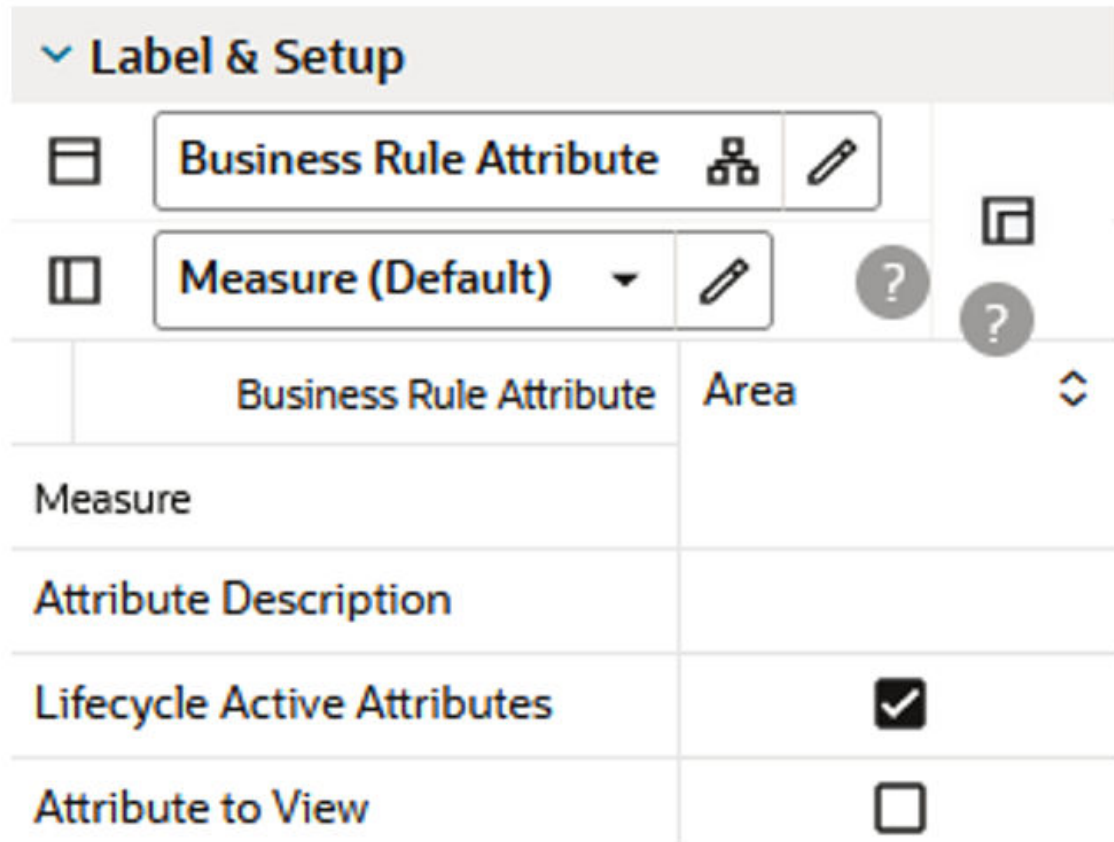
### Product-Location Attribute Mask

This measure allows you to select product and location that have relevant attributes. The attributes are displayed and can be edited in the next two steps.

## Label & Setup View

The Label & Setup view allows you to enable attributes for the IPOCS-Lifecycle Allocation and Replenishment solution and to potentially give attributes a more meaningful description.

**Figure 9-8** Label & Setup View



### Measures: Label & Setup View

The Label & Setup view contains the following measures.

#### Attribute Description

This measure allows you to give attributes a more meaningful description.

#### Lifecycle Active Attributes

This measure allows you to select attributes to be used in the Lifecycle Allocation and Replenishment solution. Some of the available attributes may not be relevant for the solution, and here is where you can specify which should be used and which not.

#### Attribute to View

This measure enables the display of attributes in the Review step. Select the measure and also the product-location combinations available within the Enable Prod/Loc view. After you run

the Lookup Attributes custom menu, then the attribute values are ready to be reviewed in the Review step. Without selecting the product-location combinations or running the Lookup Attributes custom menu, the attribute values are empty.

## Review Step

The available views are:

- [Location Attributes View](#)
- [Product Attributes View](#)
- [Product/Location Attributes View](#)

## Location Attributes View

The Location Attributes view allows you to manually enter attribute values that are location specific.

**Figure 9-9 Location Attributes View**

<span style="font-size: 1.2em;">&gt;</span> <b>Location Attributes</b>	
Business Rule Attribute	Store Open Date <span style="font-size: 0.8em;">↕</span>
Measure	
Loaded Location Attribute	<i>today</i>
Loaded Location Attribute	0.00
Loaded Location Attribute	

### Measures: Location Attributes View

The Location Attributes view contains the following measures.

#### Loaded Location Attribute String

This measure allows editing location attributes that have a string value, such as region, or store format.

#### Loaded Location Attribute Number

This measure allows editing location attributes that have a numeric value, such as number of products carried in a location, or average sales per store.

### Loaded Location Attribute Date

This measure allows editing location attributes that have a date value, such as a store open date.

## Product Attributes View

The Product Attributes view allows you to review attributes and their values that are product specific.

**Figure 9-10 Product Attributes View**

> Product Attributes	
Business Rule Attribute	Brand
Measure	
Loaded Product Attribute	brand~dylanrose
Loaded Product Attribute	
Loaded Product Attribute	0.00

### Measures: Product Attributes View

The Product Attributes view contains the following measures.

#### Product Attribute String

This measure displays product attributes that have a string value, such as brand, or class.

#### Product Attribute Number

This measure displays product attributes that have a numeric value, such as number of locations carrying an item, or average sales per item.

#### Product Attribute Date

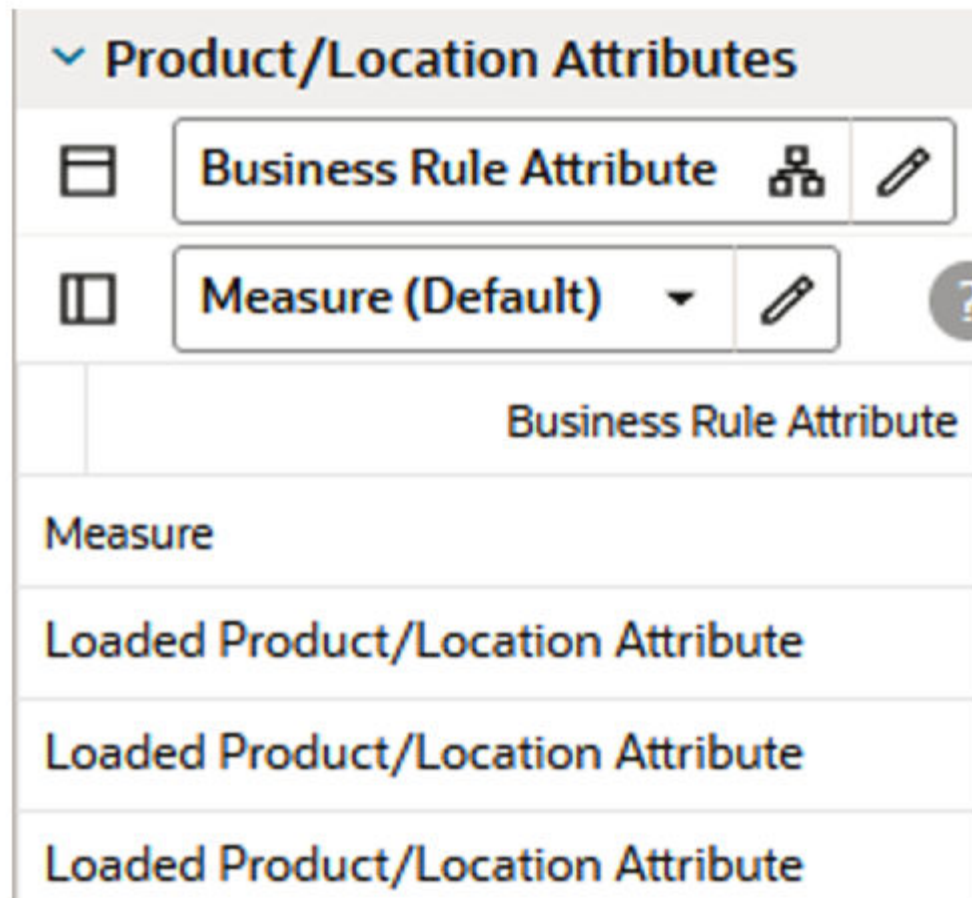
This measure displays product attributes that have a date value, such as item start date.

## Product/Location Attributes View

The Product/Location Attributes view allows you to review attributes and their values that are product/location specific.



Figure 9-11 Product/Location Attributes View



**Measures: Product/Location Attributes View**

The Product/Location Attributes view contains the following measures.

**Product-Location Attribute String**

This measure displays product/location attributes that have a string value, such as brand, or price tier.

**Product-Location Attribute Number**

This measure displays product/location attributes that have a numeric value, such as average sales or error variance.

**Product-Location Attribute Date**

This measure displays product/location attributes that have a date value, such as item start or end dates.

**Edit Step**

The available views are:

- [Location Attributes View](#)

- [Product Attributes View](#)
- [Product/Location Attributes View](#)

## Location Attributes View

The Location Attributes view allows you to manually enter attribute values that are location specific.

**Figure 9-12 Location Attributes View**

<span style="color: #0070C0;">&gt;</span> Location Attributes	
Business Rule Attribute	Store Open Date <span style="float: right;">↕</span>
Measure	
Loaded Location Attribute	<i>today</i>
Loaded Location Attribute	0.00
Loaded Location Attribute	

### Measures: Location Attributes View

The Location Attributes view contains the following measures.

#### Loaded Location Attribute String

This measure allows editing location attributes that have a string value, such as region, or store format.

#### Loaded Location Attribute Number

This measure allows editing location attributes that have a numeric value, such as number of products carried in a location, or average sales per store.

#### Loaded Location Attribute Date

This measure allows editing location attributes that have a date value, such as a store open date.

## Product Attributes View

The Product Attributes view allows you to manually edit attribute values that are product specific.

**Figure 9-13 Product Attributes View**

> Product Attributes	
Business Rule Attribute	Brand <span style="float: right;">↕</span>
Measure	
Loaded Product Attribute	brand~dylanrose
Loaded Product Attribute	
Loaded Product Attribute	0.00

**Measures: Product Attributes View**

The Product Attributes view contains the following measures.

**Loaded Product Attribute String**

This measure allows editing product attributes that have a string value, such as brand, or class.

**Loaded Product Attribute Number**

This measure allows editing product attributes that have a numeric value, such as number of locations carrying an item, or average sales per item.

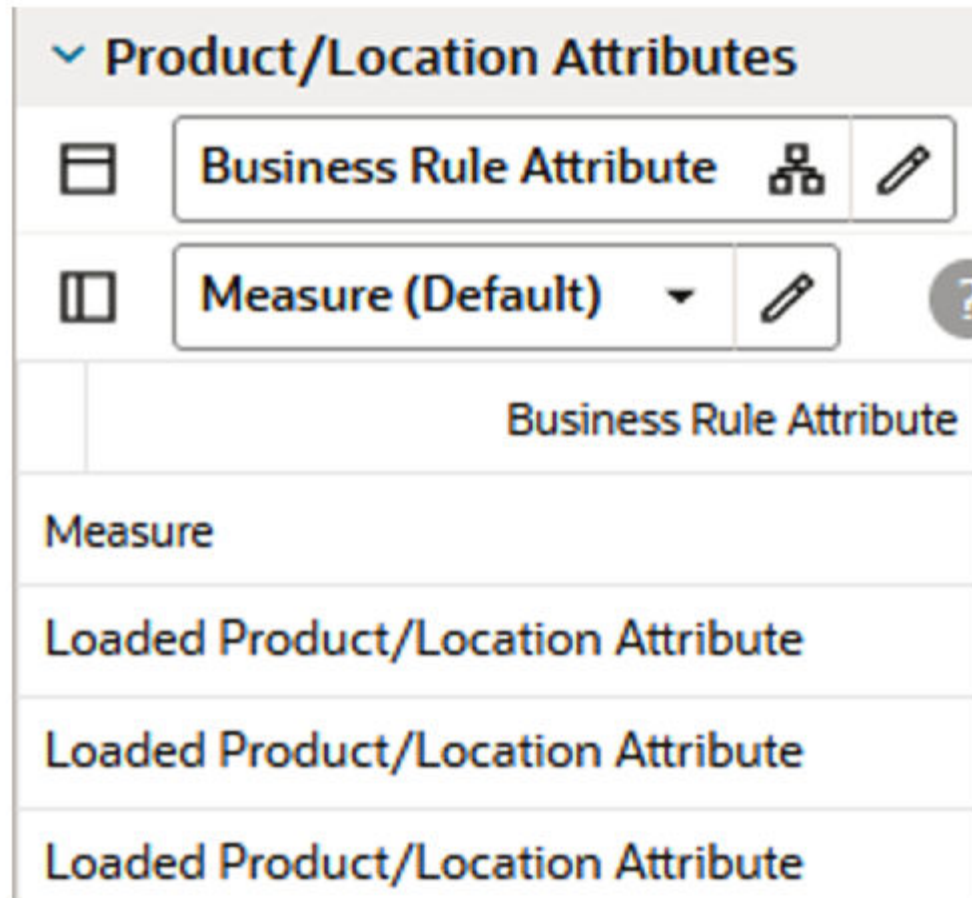
**Loaded Product Attribute Date**

This measure allows editing product attributes that have a date value, such as item start date.

## Product/Location Attributes View

The Product/Location Attributes view allows you to manually edit attribute values that are product/location specific.

Figure 9-14 Product/Location Attributes View

**Measures: Product/Location Attributes View**

The Product/Location Attributes view contains the following measures.

**Loaded Product-Location Attribute String**

This measure allows editing product/location attributes that have a string value, such as brand, or price tier.

**Loaded Product-Location Attribute Number**

This measure allows editing product/location attributes that have a numeric value, such as average sales or error variance.

**Loaded Product-Location Attribute Date**

This measure allows editing product/location attributes that have a date value, such as item start or end dates.

# 10

## Introduction: Lifecycle Allocation and Replenishment

Oracle Retail Inventory Planning Optimization Cloud Service-Lifecycle Allocation and Replenishment (IPOCS-Lifecycle Allocation and Replenishment) is an automated allocation and replenishment planning system that constantly monitors inventory conditions and based on these conditions creates point in time replenishment orders or transfers to consumer demand, while considering various constraints. Inventory movement varies from Warehouse to Store, Warehouse to Third Party, Customer Order Fulfillment, and Store to Store.

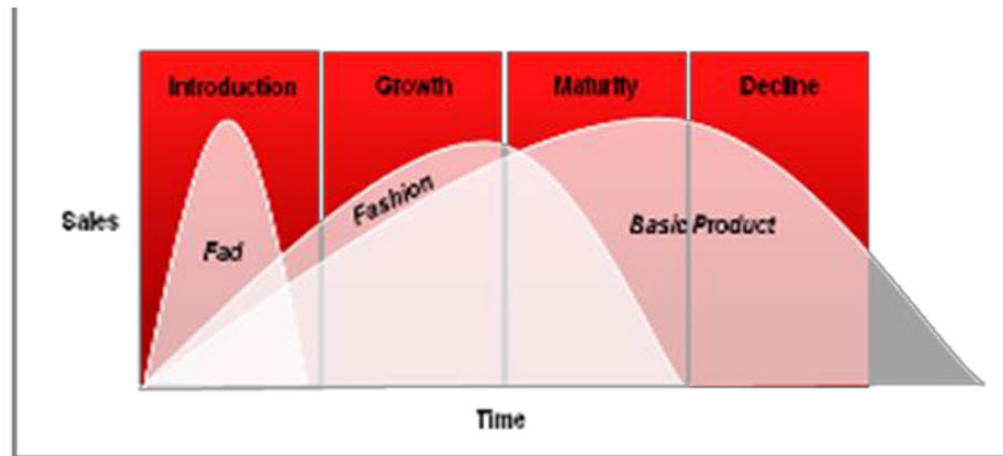
**Figure 10-1 Orders and Transfers Overview**



IPOCS-Lifecycle Allocation and Replenishment is appropriate for retailers where:

- Lead time is longer than the product lifecycle
- Items have low weekly sales by location
- Over the product's life it goes through a cycle of Initial Allocation (Product Introduction), Replenishment (Product Growth and Maturity) and Final Allocation (Product End of Life/Decline), as depicted in the following image.

Figure 10-2 Lifecycle Overview



This guide contains these chapters and appendices for the IPOCS-Lifecycle Allocation and Replenishment module:

- [Lifecycle Allocation and Replenishment Dashboard](#)
- [Assortment Administration Task](#)
- [Manage Alert Parameters](#)
- [Manage Scaling Parameters](#)
- [Manage Databags](#)
- [Manage Rule Groups](#)
- [Manage Packs](#)
- [Manage Allowed Transfer](#)
- [Supply Chain Network](#)
- [Replenishment Parameters](#)
- [Review & Approve](#)
- [Appendix: IPOCS-Lifecycle Allocation and Replenishment Exceptions & Alerts](#)
- [Appendix: Troubleshooting](#)

## Key Features

IPOCS-Lifecycle Allocation and Replenishment key features include:

- A pre-defined set of business processes, measures and rules used to support the customer requirements and business process
- Rule-based replenishment parameters management
- Assignment of replenishment parameters at item location based on rules
- User parameters focus by exception only
- Forecast-based location Target Stock (TS) level calculation

- TS can be calculated through different methods, ranging from a simple Fixed Units quantity to more sophisticated methods based on demand volatility and service level, to fit different product types and demand behaviors throughout the product lifecycle
- Analysis Capabilities
  - Ability to analyze supply chain performance indicators such as days of stock at any level of the location/Merchandise hierarchies combined with product and/or location attributes
- Product Lifecycle Recognition
  - Lifecycles are used to rule the replenishment approach over time, based on the item lifecycle phase

### **Supported Replenishment**

Supported Replenishment (pull) activities include:

- Predict how much stores will sell
- Determine how much inventory stores should carry, for example, store Target Stock (TS) level
- Predict how much the warehouse will ship to stores
- Distribution of constrained stock
- Determine how much inventory the warehouse should carry
- Generate/Review/Approve orders for all locations

### **Supported Allocation**

Supported Allocation (push) activities include:

- Post-distribute goods housed in warehouses to stores (end-of-life management).
- Management of store-to-store transfers when supply is limited or for stock re- balancing across stores.

## User Experience and Workflow

The user experience is delivered on our experience inspired Retail Predictive Application Server Cloud Edition (RPASCE) user interface (UI). RPASCE provides end-users with a next-generation cloud-native UI that is purpose-built to accelerate intent into action for planners and forecasters. This includes interactive and visual dashboards to assess priorities, responsive and flexible workspaces to implement decisions and a coordinated exceptions framework that ties business processes all the way from dashboard to mobile phone.

# 11

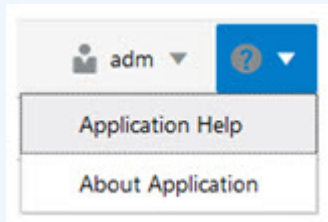
## Lifecycle Allocation and Replenishment Dashboard

The IPOCS-Lifecycle Allocation and Replenishment dashboard is the workspace that opens on login. You can use the dashboard to quickly analyze the health of the business. The dashboard needs to be refreshed periodically as new products, locations, and replenishment-related data are added. This typically happens weekly but depends on your administrator's settings. The measure data of existing products and locations in the dashboard can be refreshed at any time to view updated changes.

 **Note:**

For additional information about the user interface, dashboard, and workspaces, click **Application Help** from the **Help** icon on the dashboard.

**Figure 11-1 Application Help**



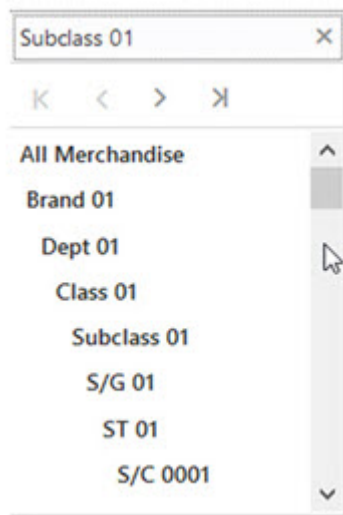
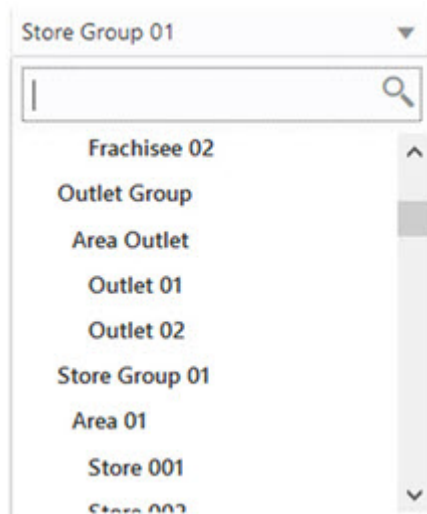
IPOCS-Lifecycle Allocation and Replenishment has two dashboard profile types and includes the following profiles for each type:

- Metric profile type
  - Overview
- Exception profile type
  - Setup Exceptions
  - Replenishment Exceptions



**Figure 11-2 Dashboard Profiles**

The information in the metric and exception profiles is summarized in tiles, which can be filtered, for example, on the product, location, or any other hierarchy that makes sense as shown in the following image.

**Figure 11-3 Merchandise Filter****Figure 11-4 Location Filter**

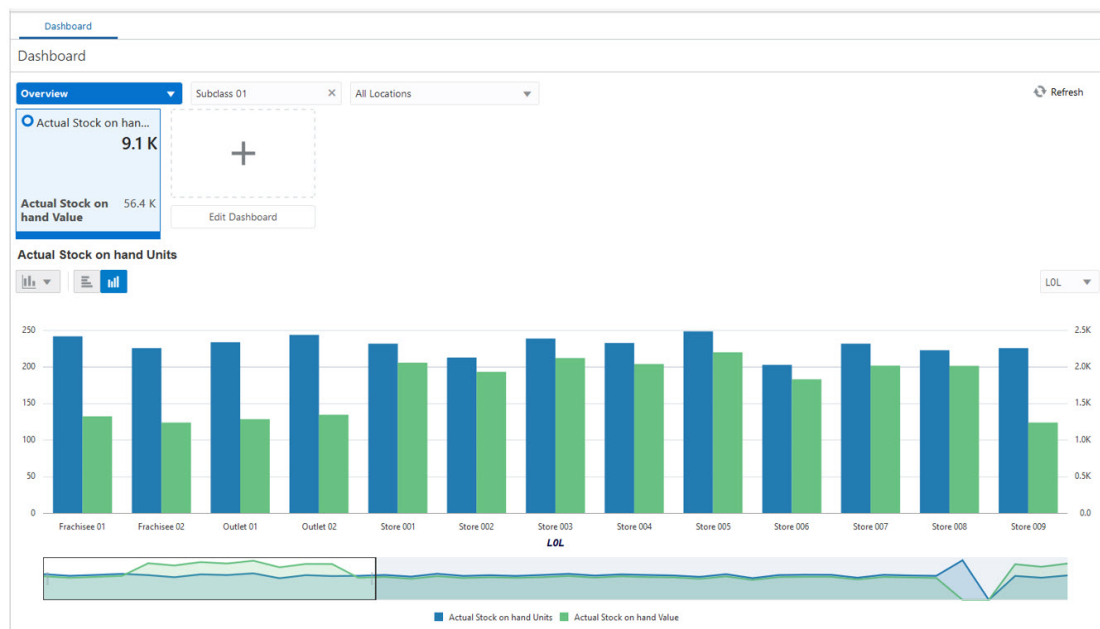
The information presented is condensed in the tile metrics, which is also shown in a chart that is broken down into more detail.

In addition, there is the Administration dashboard which provides information about scheduled OAT tasks, or workspace build information. More information about the Administration dashboard can be found in the *Oracle Retail Predictive Application Server Cloud Edition User Guide*.

## Overview Dashboard

There is one GA tile in the Overview dashboard.

**Figure 11-5 Overview Dashboard**



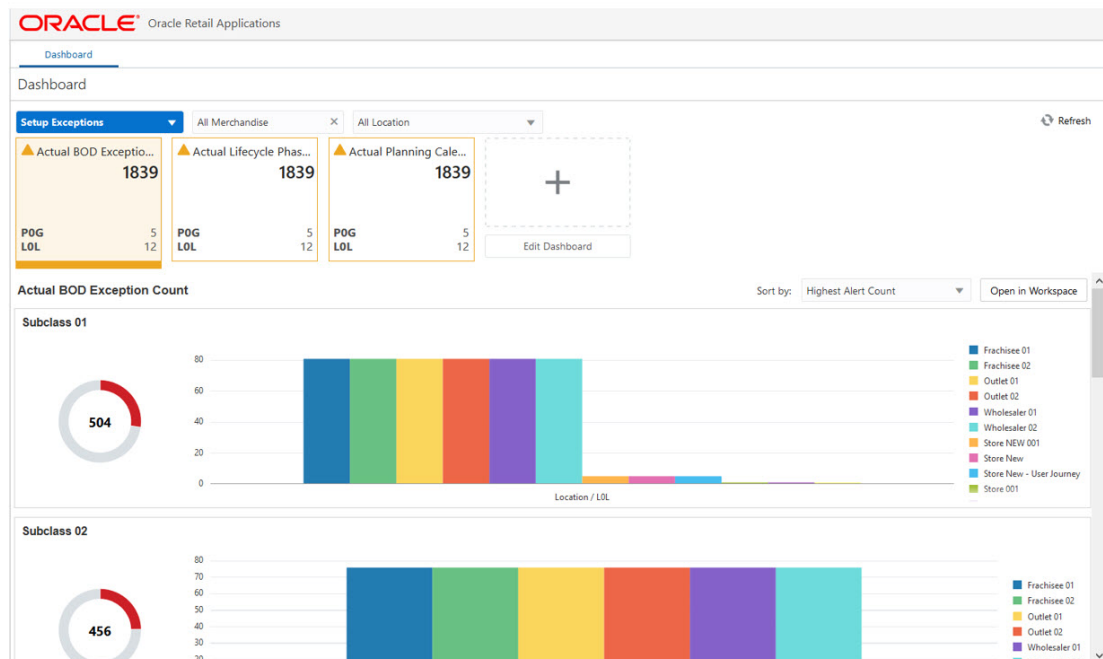
### Actual Stock on Hand Units

This tile displays information about the current and historical on-hand stock in units and retail value.

## Setup Exceptions Dashboard

This is the first of the exception profile types available in IPOCS-Lifecycle Allocation and Replenishment. It is relevant to identify merchandise and location with set up issues such as, missing replenishment parameters/methods or supply chain network models.

Figure 11-6 Setup Exceptions Dashboard



The hit count represents the number of products in the subclass and location, within the store group, that are missing set up rules according to the configured business rules.

### Exceptions

The information displayed in the tiles is based on exceptions, or business rules defined to check if the replenishment parameters and supply network model are set up for all product and location combinations that are expecting a replenishment plan recommended by IPOCS-Lifecycle Allocation and Replenishment. The exception definitions and expressions are detailed in the [Appendix: IPOCS-Lifecycle Allocation and Replenishment Exceptions & Alerts](#).

### Number of Hits Count

The main metric in the tiles is the number of hit counts which are based on the product and location filter settings. If the filter settings range products and locations to a narrower selection than, **All Product** and **All Location**, then the number should be reflected in the tile; that is, it should decrease.

### Number of Subclass and Store Group

The secondary metric on the tiles displays the number of subclass and districts that are affected. Note that the dimensions are configurable.

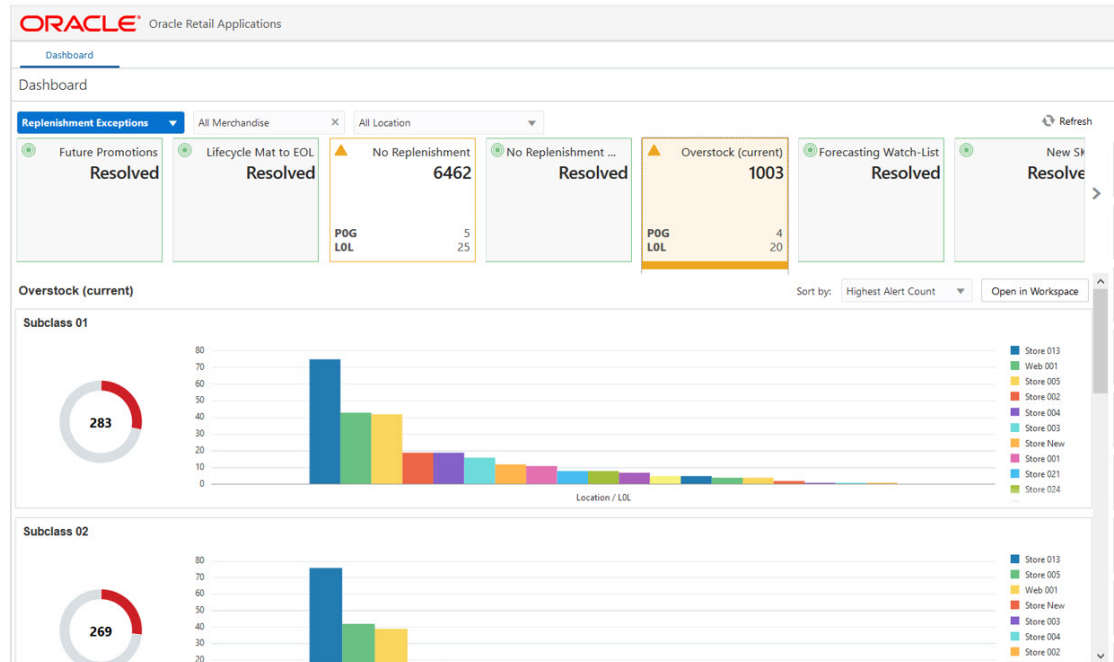
### Charts

Each tile comes with a set of charts where the hit count information is broken down to lower levels and sorted based on hit count.

## Replenishment Exceptions

This is the second of the exception profile types available in IPOCS-Lifecycle Allocation and Replenishment. It is relevant to identify merchandise and location where the suggested replenishment needs the user's attention. For example, a particular product and location might be in an overstock situation and may need the replenishment plan overridden by the user and a potential review of the replenishment parameters to reduce the overstock.

**Figure 11-7 Replenishment Exceptions**



## Exceptions

The information displayed in the tiles is based on exceptions, or business rules defined to identify the outliers that need the replenishment plan recommended by IPOCS-Lifecycle Allocation and Replenishment reviewed. The exception definitions and expressions are detailed in the [Appendix: IPOCS-Lifecycle Allocation and Replenishment Exceptions & Alerts](#).

# 12

## Assortment Administration Task

This chapter describes the functionality that allows you to review and maintain the assortment within IPOCS-Lifecycle Allocation and Replenishment.

In IPOCS-Lifecycle Allocation and Replenishment assortment information is used during the replenishment calculation. Replenishment should only be suggested for valid product and location combinations rather than for all product and location combinations. It is during this process where the assortment information is very important to allow IPOCS-Lifecycle Allocation and Replenishment to replenish only valid combinations, it also improves calculation performance by reducing the amount of product and location combinations.

Based on the assortment information IPOCS-Lifecycle Allocation and Replenishment identifies valid product and location combinations if the following conditions are met:

- If the product and location combination is active when the system runs the replenishment calculations. In other words, if the system date (today's date) is within the Assortment Start and Assortment End Dates for the product and location combination
- There are historical sales for the product and location combination.
- There is allocation information for the product and location combination.
- If users have overridden the assortment information and have created an exception to force a particular product and location combination to be valid (assorted)

### Assortment Administration Workspace, Steps, and Views

The following table lists the workspaces, steps, and views for the Assortment Administration task.

**Table 12-1 Assortment Admin Workspace, Steps and Views**

Workspace	Step	Tab	Views
Assortment Admin Workspace	Review Parameters Step	Assortment Summary	Actual Data View
			Assortment View
		Assortment Parameters	Assortment Parameters View
			Filter View
	Review Assortment Step	By Parent	Location View
			Variant View
			Variant-Location View
			Variant-Location-Week View
	By Item	Location View	
		Product-Location View	

**Table 12-1 (Cont.) Assortment Admin Workspace, Steps and Views**

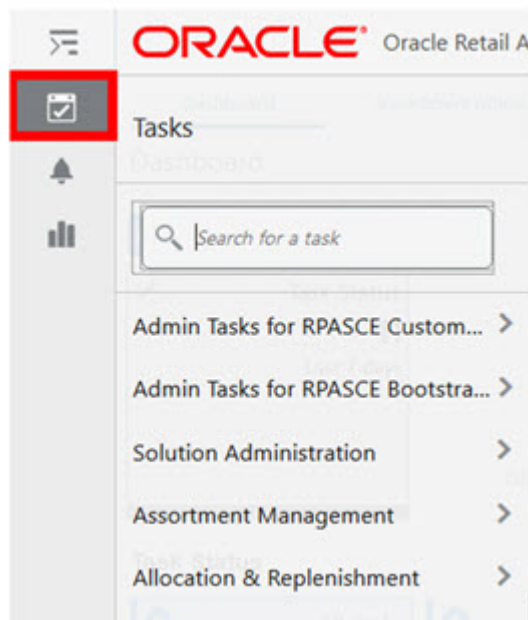
Workspace	Step	Tab	Views
		Actual Data	<a href="#">Product-Location-Week View</a>

## Assortment Admin Workspace

The Assortment Admin workspace allows you to access all the views listed in [Assortment Administration Workspace, Steps, and Views](#). To build the Assortment Admin workspace, perform these steps:

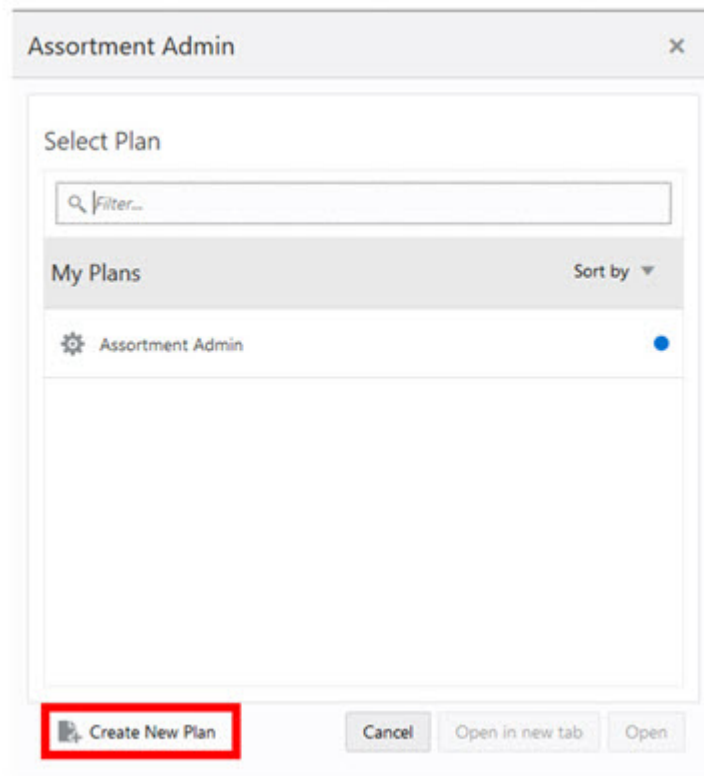
1. From the left sidebar menu, click the **Task Module** to view the available tasks.

**Figure 12-1 Task Module**



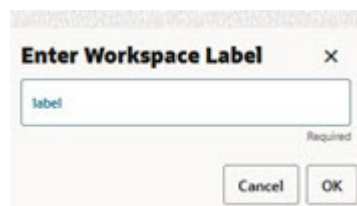
2. Click the **Assortment Management** activity to access the available workspaces.
3. Click **Assortment Admin**. The Assortment Admin wizard opens. You can open an existing workspace, but to create a new workspace, click **Create New Workspace**.

**Figure 12-2 Assortment Admin Wizard**



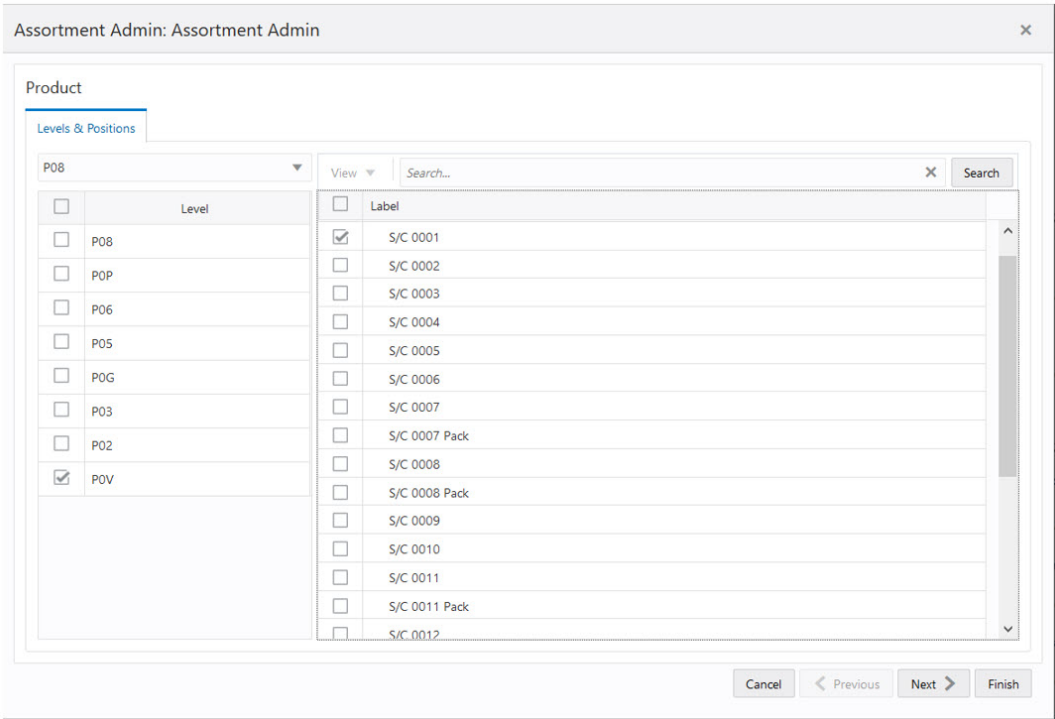
4. Enter a name for your new workspace in the label text box and click **OK**.

**Figure 12-3 Enter Workspace Label**



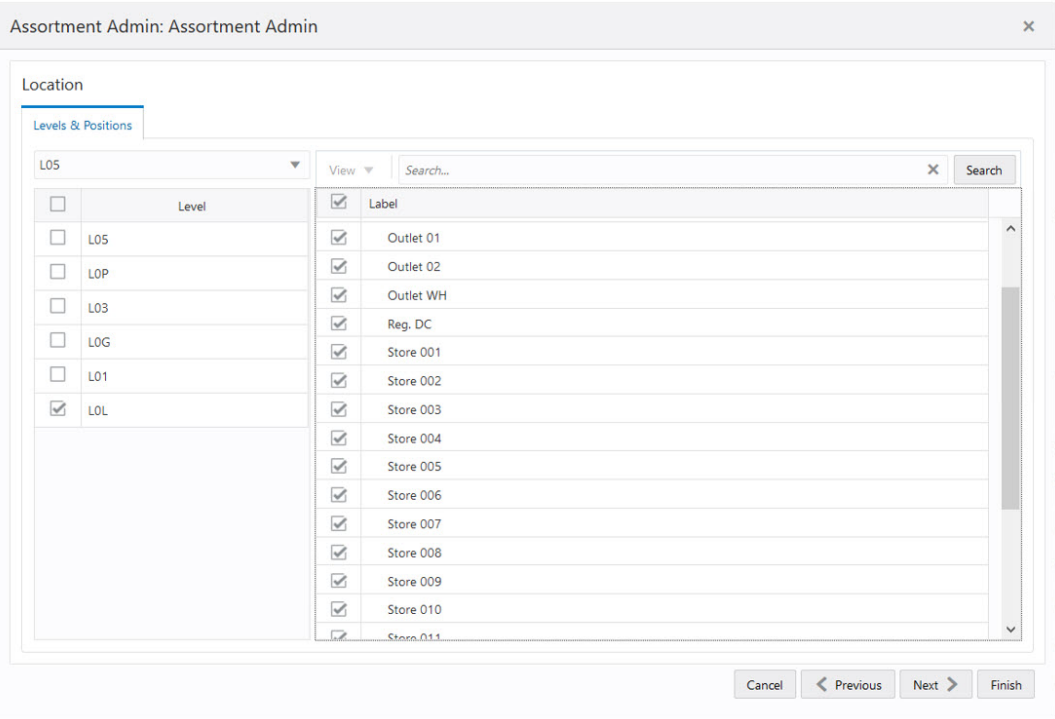
5. The Workspace wizard opens. Select the products you want to work with and click **Next**.

Figure 12-4 Workspace Wizard: Select Product



6. Select the locations you want to work with and click **Next**.

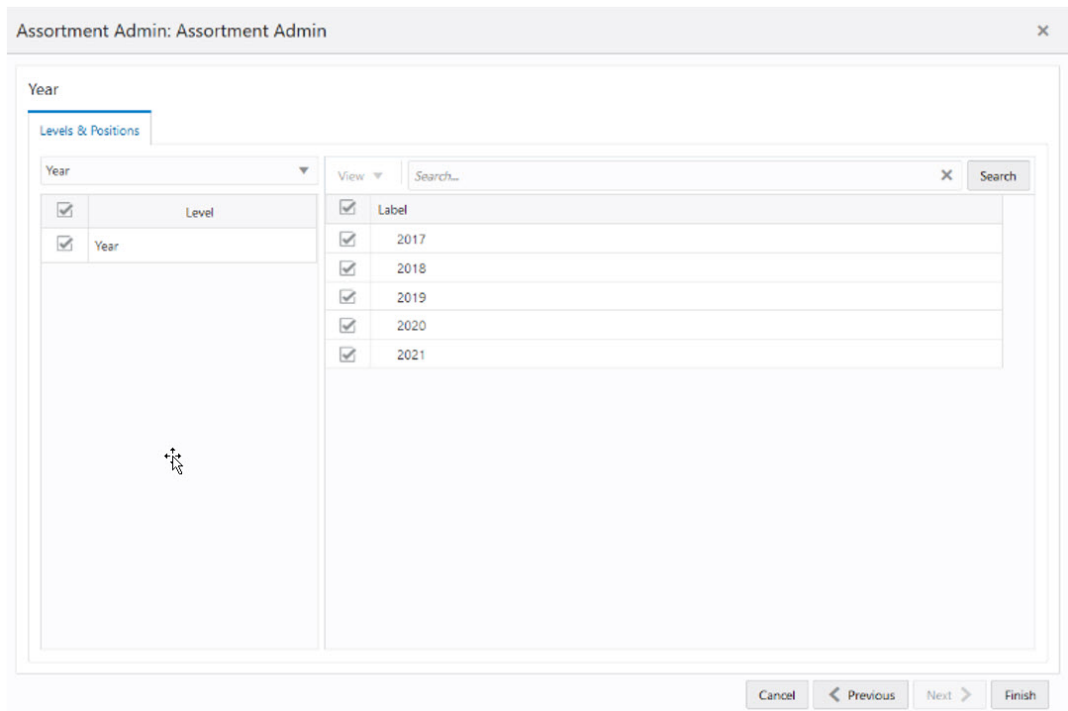
Figure 12-5 Workspace Wizard: Select Location



7. Select the calendar period you want to work with and click **Finish**.

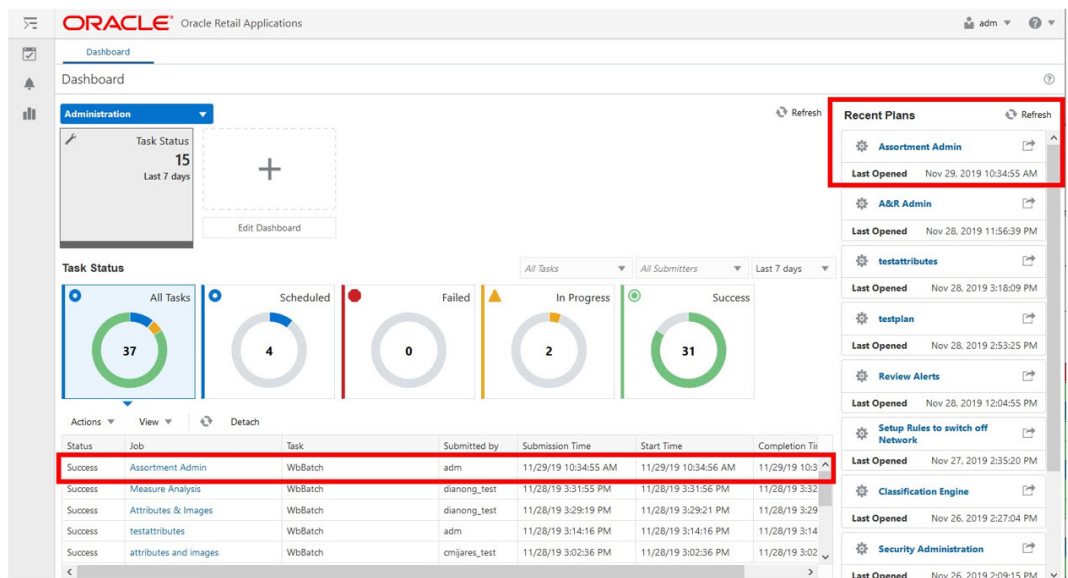


Figure 12-6 Workspace Wizard: Select Calendar



8. The wizard notifies you that your workspace is being prepared. Successful workspaces are available from the Dashboard.

Figure 12-7 Successful Workspace Build



## Review Parameters Step

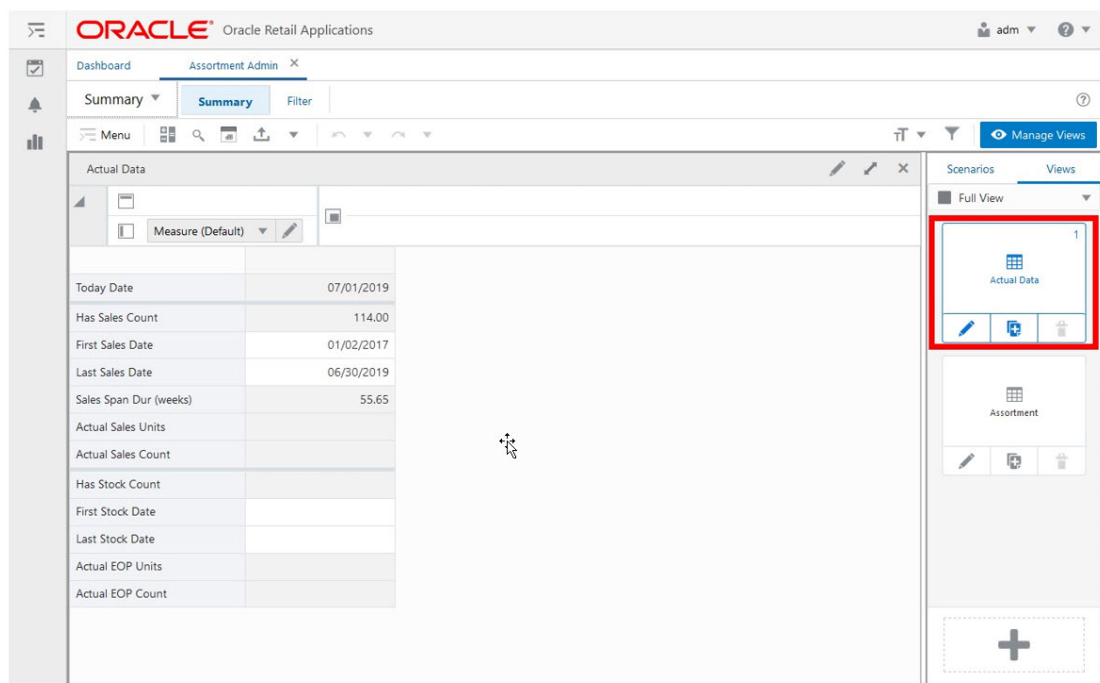
This step contains these views:

- [Actual Data View](#)
- [Assortment View](#)
- [Assortment Parameters View](#)
- [Filter View](#)

## Actual Data View

The **Actual Data View**, under the **Assortment Summary** tab, allows you to review high-level actuals that are relevant for the assortment administration. For example, what is the date of the first sale within the workspace's scope.

**Figure 12-8 Actual Data View**



### Measures: Actual Data View

**Note:**

In this view, there are no hierarchies in the axis, all the measures in this view are shown aggregated based on all product and all location (and calendar where relevant). It is applicable to the scope loaded into the workspace.

#### Today Date

This is a loaded read-only measure to display the system date that is calculated by the IPOCS-Lifecycle Allocation and Replenishment batch.

#### Has Sales Count

This is a calculated measure used to indicate the total number of loaded product and location combinations for which IPOCS-Lifecycle Allocation and Replenishment has sales data.

**First Sales Date**

This is a calculated measure used to indicate the first sales date for the workbook scope based on the loaded product and location daily sales. The first sales date is the earliest date of all products sold in all locations.

**Last Sales Date**

This is a calculated measure used to indicate the last sales date for the location based on the loaded product and location daily sales. The last sales date is the later date of all products sold in all locations.

**Sales Span Dur (Weeks)**

This is a calculated measure to show the number of week's sales across the calendar.

**Actual Sales Units**

This is a calculated measure used to indicate the total sales units considering the daily sales of the product and location combination.

**Actual Sales Count**

This is a calculated measure used to indicate the total number of product and location combinations with sales units (greater than 0 units).

**Has Stock Count**

This is a calculated measure used to indicate the total number of product and location combinations for which IPOCS-Lifecycle Allocation and Replenishment has stock data.

**First Stock Date**

This is a calculated measure used to indicate the first inventory date for the workbook scope based on the loaded product and location inventory. The first inventory date is the earliest date of all products and location inventories.

**Last Stock Date**

This is a calculated measure used to indicate the last inventory date for the workbook scope based on the loaded product and location inventory. The last inventory date is the later date of all products and location inventories.

**Actual EOP Units**

This is a calculated measure used to indicate the end-of-period inventory in units considering the actual inventory position for product and location combinations loaded into the workspace.

**Actual EOP Count**

This is a calculated measure used to indicate the total number of product and location combinations with end-of-period inventory (greater than 0 units).

## Assortment View

The **Assortment View**, under the **Assortment Summary tab**, allows you to see a high-level overview of the assortments.

Figure 12-9 Assortment View

Measure	Value
Asst. Loc Valid Count	40.00
Asst. Loc Start Date	
Asst. Loc End Date	
Asst. Var Start Date	
Asst. Var End Date	
Asst. Var-Loc Def. Count	40.00
Asst. Var-Loc Exc. Count	
Asst. Var-Loc Exc. End Count	
Asst. Var-Loc Exc. Start Count	
Asst. Prod-Loc Exc. Count	1.00
Asst. Prod-Loc Exc. Start Count	2.00
Asst. Prod-Loc Exc. End Count	2.00
Plan Asst. Prod-Loc Start Date	12/29/2018
Plan Asst. Prod-Loc End Date	07/01/2020
Asst. Prod-Loc Count	120.00

### Measures: Assortment View

The Assortment view contains the following measures.

#### Asst. Loc Valid Count

This is a calculated measure used to indicate the total number of locations with at least one valid product and location combination assorted. In this view, the measure contains the total number for the workspace scope.

#### Asst. Loc Start Date

This is a calculated measure used to indicate the earliest populated location start date within the [Validation] Location Step.

#### Asst. Loc End Date

This is a calculated measure used to indicate the last populated location end date within the [Validation] Location Step.

#### Asst. Var Start Date

This is a calculated measure used to indicate the earliest populated Variant start date within the [Validation] Variant Step.

#### Asst. Var End Date

This is a calculated measure used to indicate the last populated Variant end date within the [Validation] Variant Step.

#### Asst. Var-Loc Def. Count

This is a calculated measure used to indicate the total number of variance and location combinations assorted. In this view, the measure contains the total number for the workspace scope.

**Asst. Var-Loc Exc. Count**

This is a calculated measure used to indicate the number of exceptions that are being used at the Var-Loc level.

**Asst. Var-Loc Exc. End Count**

This is a calculated measure used to indicate the number of populated end date exceptions at the Variant Location level.

**Asst. Var-Loc Exc. Start Count**

This is a calculated measure used to indicate the number of populated start date exceptions at the Variant Location level.

**Asst. Prod-Loc Exc. Count**

This is a calculated measure used to indicate the number of exceptions that are being used at the Prod-Loc level.

**Asst. Prod-Loc Exc. End Count**

This is a calculated measure used to indicate the number of populated end date exceptions at the Product Location level.

**Asst. Prod-Loc Exc. Start Count**

This is a calculated measure used to indicate the number of populated start date exceptions at the Product Location level.

**Plan Asst. Prod-Loc Start Date**

This is a calculated measure used to indicate the earliest plan assortment start dates for all item / location.

**Plan Asst. Prod-Loc End Date**

This is a calculated measure used to indicate the last plan assortment end dates for all item / location.

**Asst. Prod-Loc Count**

This is a calculated measure used to indicate the total number of product and location combinations assorted. In this view, the measure contains the total number for the workspace scope.

**Asst. Prod-Loc Active Count**

This is a calculated measure used to indicate the total number of product and location combinations assorted and still active. If the assortment end date has not been reached yet, then it is active. Otherwise, it is inactive meaning that the assortment has already stopped. In this view, the measure contains the total number for the workspace scope.

**Asst. Var-Loc Count**

This is a calculated measure used to indicate the total number of variance and location combinations assorted. In this view, the measure contains the total number for the workspace scope.

**Asst. Var-Loc Active Count**

This is a calculated measure used to indicate the total number of variance and location combinations assorted and still active. If the assortment end date has not been reached yet, for all products within the variance, then it is active. Otherwise, it is inactive meaning that the assortment has already stopped. In this view, the measure contains the total number for the workspace scope.

**Lfc. Prod-Loc Def. Count**

This is a calculated measure used to indicate the total number of product and location combinations with a default valid lifecycle. In this view, the measure contains the total number for the workspace scope.

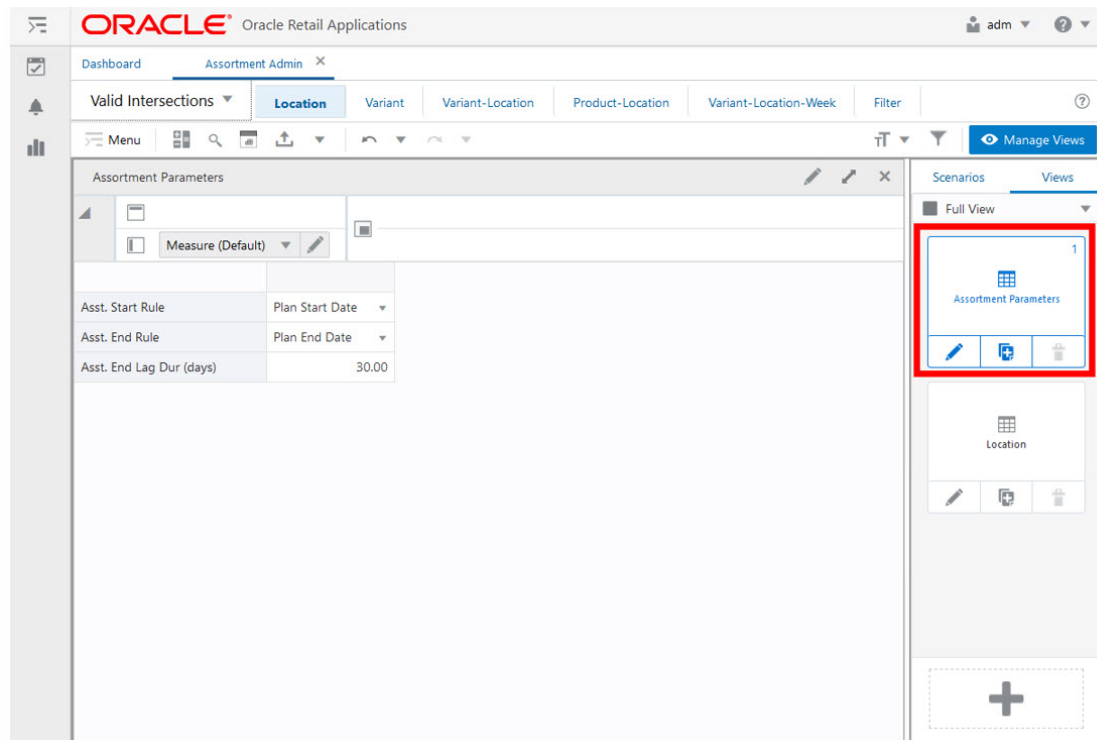
**Lfc. Prod-Loc Count**

This is a calculated measure used to indicate the total number of product and location combinations with a valid lifecycle considering the user-defined lifecycle exceptions. In this view, the measure contains the total number for the workspace scope.

## Assortment Parameters View

The **Assortment Parameters View**, under the **Assortment Parameters tab**, allows you to set up assortment rules to be considered by the IPOCS-Lifecycle Allocation and Replenishment assortment calculation functionality.

**Figure 12-10 Assortment Parameters View**



**Measures: Assortment Parameters View**

The Assortment Parameters view contains the following measures.

**Asst. Start Rule**

- **Plan Start Date**  
The assortment start date loaded into IPOCS-Lifecycle Allocation and Replenishment is used. If there is an exception forced by you then the exception takes priority.
- **First Sales after Plan Start Date**  
If the first sale occurs after the planned start date, then the assortment start date is the first sales date. Otherwise, the assortment start date is the planned start date.
- **First Stock after Plan Start Date**  
If the first inventory has been received after the planned start date, then the assortment start date is the date that the first inventory was received. Otherwise, the assortment start date is the planned start date.
- **Min {Plan Start Date - First Sales}**  
The assortment start date is the oldest date between the first sale date and the planned assortment start date loaded into IPOCS-Lifecycle Allocation and Replenishment.
- **Min {Plan Start Date - First Stock}**  
The assortment start date is the oldest date between the first inventory date and the planned assortment start date loaded into IPOCS-Lifecycle Allocation and Replenishment.
- **Min {Plan Start Date - First Sales/Stock}**  
The assortment start date is the oldest date between the first inventory date, the first sales date and the planned assortment start date loaded into IPOCS-Lifecycle Allocation and Replenishment.
- **First Sales**  
The first sales date is used for the assortment start date.
- **First Stock**  
The first inventory date is used for the assortment start date.
- **First Sales/Stock**  
The assortment start date is the oldest date between the first inventory date and the first sales date.

#### **Asst. End Rule**

This is an editable measure to define how IPOCS-Lifecycle Allocation and Replenishment should calculate the assortment end date. Valid values are:

- **Plan End Date**  
The assortment end date loaded into IPOCS-Lifecycle Allocation and Replenishment. If there is an exception forced by you, then the exception takes priority.
- **Max {Plan End Date - Last Sales}**  
The assortment end date is the date that comes last between the last sale date and the planned assortment end date loaded into IPOCS-Lifecycle Allocation and Replenishment. Please note that when the loaded assortment end date is empty IPOCS-Lifecycle Allocation and Replenishment assumes the latest calendar day available as the assortment end date calculation.
- **Max {Plan End Date - Last Stock}**  
The assortment end date is the date that comes last between the last inventory date and the planned assortment end date loaded into IPOCS-Lifecycle Allocation and Replenishment. Please note that when the loaded assortment end date is empty IPOCS-

Lifecycle Allocation and Replenishment assumes the latest calendar day available as the assortment end date calculation.

- Max {Plan End Date - Last Sales/Stock}

The assortment end date is the date that comes last between the last sale date, the last inventory date and the planned assortment end date loaded into IPOCS-Lifecycle Allocation and Replenishment. Please note that when the loaded assortment end date is empty IPOCS-Lifecycle Allocation and Replenishment assumes the latest calendar day available as the assortment end date calculation.

- Min {Plan End Date - Last Stock}

The assortment end date is the date that comes first between the last inventory date and the planned assortment end date loaded into IPOCS-Lifecycle Allocation and Replenishment. Please note that when the loaded assortment end date is empty IPOCS-Lifecycle Allocation and Replenishment assumes the latest calendar day available as the assortment end date calculation.

- Min {Plan Start Date - Last Sales/Stock}

The assortment end date is the date that comes first between the last sale date, last inventory date and the planned assortment end date loaded into IPOCS-Lifecycle Allocation and Replenishment. Please note that when the loaded assortment end date is empty IPOCS-Lifecycle Allocation and Replenishment assumes the latest calendar day available as the assortment end date calculation.

- Last Sales

The last sales date is used for the assortment end date.

- Last Stock

The last inventory date is used for the assortment last date.

- Last Sales/Stock

The assortment end date is date that comes last between the last inventory date and the last sales date.

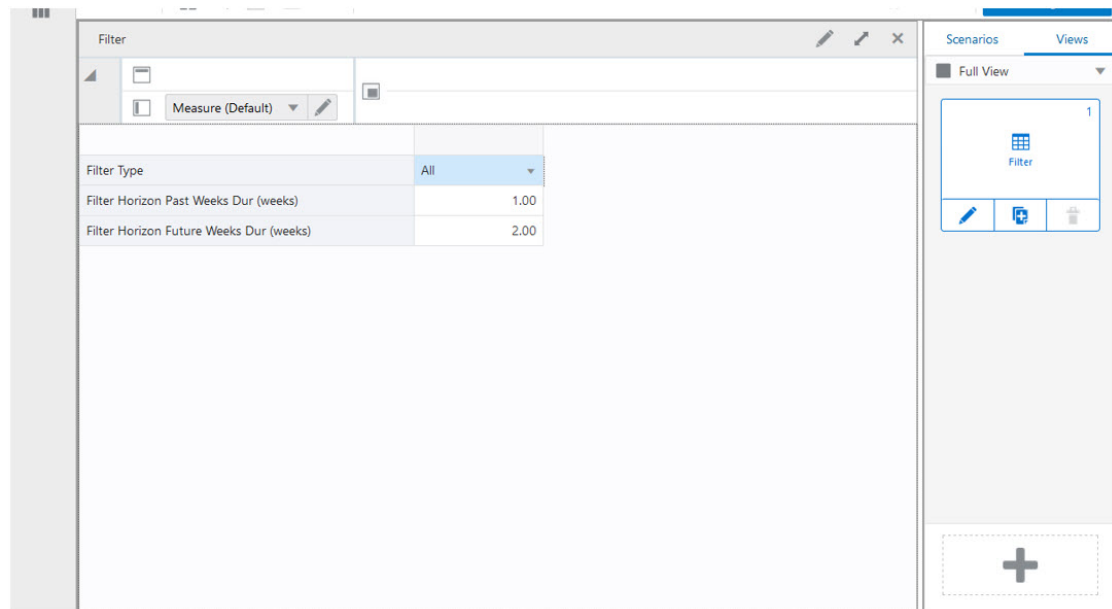
#### **Asst. End Lag Dur (days)**

This is an editable measure to define the number of lag days that the system considers for the sales and inventory for the assortment calculations. When the assortment is calculated based on the sales or inventory data and if the data from today's date is older than the lag days indicated then the product and location combination is not assorted. For example, if the product does not sell for more than 30 days in a particular location, then it is removed from the assortment of that location.

## Filter View

The **Filter View**, under the **Assortment Parameters tab**, allows you to set up a filter to work the assortment. For example, you can use the filter to display product and location combinations where the assortment is valid.



**Figure 12-11 Filter View****Measures: Filter View**

The Filter view contains the following measures.

**Filter Type**

This is an editable measure to define what type of filter should be applied to the views within the Assortment Admin workspace. Valid values are:

- All  
No filter is applied. All information is displayed.
- Default Asst  
Only valid assortments, by default, are displayed. The product and location combinations are filter based on the value of the measure Asst. Var-Loc Def. If the measure is selected, then the combination is captured the filter. Otherwise, it is excluded by the filter.
- Valid Asst  
Only valid assortments are displayed. The product and location combinations are filtered based on the measure Asst. Var-Loc Def. value. If the measure is selected, then the combination is captured by the filter. Otherwise, it is excluded by the filter.
- Asst Active  
Only active assortments are displayed. The product and location combinations are filtered based on the measure Asst. Prod-Loc value. If the measure is selected, then the combination is captured by the filter. Otherwise, it is excluded by the filter.
- Default Lfc  
Only a valid lifecycle, by default, is displayed. The product and location combinations are filtered based on the measure Lfc. Prod-Loc Def. value. If the measure is selected, then the combination is captured by the filter. Otherwise, it is excluded by the filter.
- Valid Lfc

Only the valid lifecycle is displayed. The product and location combinations are filtered based on the measure Lfc. Prod-Loc value. If the measure is selected, then the combination is captured by the filter. Otherwise, it is excluded by the filter.

## Review Assortment Step

This step contains these views:

- [Location View](#)
- [Variant View](#)
- [Variant-Location View](#)
- [Variant-Location-Week View](#)
- [Product-Location View](#)
- [Product-Location-Week View](#)

### Location View

The **Location View**, under the **Review Assortment** tab and **By Parent** tabs, allows you to review and/or manage the assortment but at the location level only. The analysis is kept at location level without products.

**Figure 12-12 Location View**

	Store 001	Store 002	Store 003	Store 004	Store 005	Store 006	Store 007	Store 008
User Valid Prod-Loc Filter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asst. Loc Valid	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Asst. Loc Start Date								
Asst. Loc End Date								
Has Sales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
First Sales Date	01/02/2017	01/10/2017	01/02/2017	01/04/2017	01/11/2017	01/02/2017	01/02/2017	01/02/2017
Last Sales Date	06/30/2019	06/30/2019	06/30/2019	06/30/2019	06/30/2019	06/30/2019	06/30/2019	06/30/2019
Has Stock	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
First Stock Date								
Last Stock Date								
Asst. Prod-Loc Count	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00
Asst. Prod-Loc Active Count	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00
Asst. Var-Loc Count	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00

#### Measures: Location View

The Location view contains the following measures.

 **Note:**

The measures displayed in this view are supported by their counterparts defined at the product and location level. Therefore, the calculated measures in this view are the result of aggregating the ones at the product and location intersection.

**User Valid Prod-Loc Filter**

This is an editable measure to select locations to be filtered. The views display only the selected locations.

**Asst. Loc Valid**

This is a calculated measure to identify whether the location has a valid assortment or not. The location has a valid assortment when it contains a valid product assortment, or you have populated the location assortment start date or end date.

**Asst. Loc Start Date**

This is an editable measure to enter the location's assortment start date.

**Asst. Loc End Date**

This is an editable measure to enter the location's assortment end date.

**Has Sales**

This is a calculated measure used to indicate whether a location has sales data within IPOCS-Lifecycle Allocation and Replenishment or not. When selected, at least one product within the location would have sales, otherwise, there are no sales in IPOCS-Lifecycle Allocation and Replenishment.

**First Sales Date**

This is a calculated measure used to indicate the first sales date for the location based on the loaded product and location daily sales. In this view the location first sales date is the earliest date of all products sold in the location.

**Last Sales Date**

This is a calculated measure used to indicate the last sales date for the location based on the loaded product and location daily sales. In this view, the location last sales date is the later date of all products sold in the location.

**Has Stock**

This is a calculated measure used to indicate whether a location has inventory data within IPOCS-Lifecycle Allocation and Replenishment or not. When selected, then at least one product within the location would have sales, otherwise, there are no sales in IPOCS- Lifecycle Allocation and Replenishment.

**First Stock Date**

This is a calculated measure used to indicate the first inventory date for the location based on the loaded product and location inventory. The location first inventory date is the earliest date of all product inventory in the location.

**Last Stock Date**

This is a calculated measure used to indicate the last inventory date for the location based on the loaded product and location inventory. The location last inventory date is the later date of all product inventory in the location.

**Asst. Prod-Loc Count**

This is a calculated measure used to indicate the total number of product and location combinations assorted. In this view, the measure displays the total number of products for the location.

**Asst. Prod-Loc Active Count**

This is a calculated measure used to indicate the total number of product and location combinations assorted and still active. If the assortment end date has not been reached yet, then it is active. Otherwise, it is inactive, meaning that the assortment has already stopped. In this view, the measure displays the total number of products for the location.

**Asst. Var-Loc Count**

This is a calculated measure used to indicate the total number of variance and location combinations assorted. In this view, the measure displays the total number of variants for the location.

**Asst. Var-Loc Active Count**

This is a calculated measure used to indicate the total number of variance and location combinations assorted and still active. If the assortment end date has not been reached yet, for all products within the variance, then it is active. Otherwise, it is inactive, meaning that the assortment has already stopped. In this view, the measure displays the total number of variants for the location.

**Asst. Var-Loc Start Date**

This is a calculated measure used to indicate the assortment start date for the assorted variance and location combinations. In this view, the measure displays the earliest date from all the variances assorted for the location.

**Asst. Var-Loc End Date**

This is a calculated measure used to indicate the assortment end date for the assorted variance and location combinations. In this view, the measure displays the later date from all the variances assorted for the location.

**Asst. Var-Loc From Start Dur (weeks)**

This is a calculated measure used to indicate the number of elapsed weeks since the assortment started date indicated in the measure Asst. Var-Loc Start Date. The number of weeks is calculated until the IPOCS-Lifecycle Allocation and Replenishment today's week.

**Lfc. Loc Valid**

This is a calculated measure to identify whether the location has valid lifecycle products or not. The location has a valid lifecycle when it contains at least one valid lifecycle product.

**Lfc. Prod-Loc Exc.**

This is an editable measure to set a lifecycle exception for all products within the location. Valid values are:

- Default  
This value ignores the lifecycle exception and keeps the default lifecycle result.

- On  
This value enables the exception and uses the exception dates for the lifecycle calculation.
- Off  
This value enables the exception and disables all of the products in the location for the lifecycle calculation.

### Lfc. Prod-Loc Count

This is a calculated measure used to indicate the total number of product and location combinations with a valid lifecycle. In this view, the measure displays the total number of valid lifecycles for all the products in the location.

## Variant View

The **Variant View**, under the **Review Assortment tab**, and **By Parent tab**, allows you to review and manage the assortment but at the variant level only. The analysis is kept at variant level without locations.

**Figure 12-13 Variant View**

	nmy_Test	S/C 0001	S/C 0002	S/C 0003	S/C 0004	S/C 0005	S/C 0006	S/C 0007
User Valid Prod-Loc Filter	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asst. Var Start Date								01/01/2020
Asst. Var End Date								01/01/2020
Has Sales	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
First Sales Date		01/02/2017	01/02/2017	01/02/2017	01/02/2017	01/02/2017	01/02/2017	01/01/2020
Last Sales Date		06/30/2019	06/30/2019	06/30/2019	06/30/2019	06/30/2019	06/30/2019	06/30/2019
Has Stock	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
First Stock Date								
Last Stock Date								
Asst. Prod-Loc Count	1.00	120.00	120.00	120.00	120.00	120.00	120.00	120.00
Asst. Prod-Loc Active Count	1.00	120.00	120.00	120.00	120.00	120.00	120.00	120.00
Asst. Var-Loc Count	1.00	40.00	40.00	40.00	40.00	40.00	40.00	4.00
Asst. Var-Loc Active Count	1.00	40.00	40.00	40.00	40.00	40.00	40.00	4.00
Asst. Var-Loc Start Date	01/06/2018	01/02/2017	01/02/2017	01/02/2017	01/02/2017	01/02/2017	01/02/2017	01/02/2017

### Measures: Variant View

The Variant view contains the following measures.

#### Note:

The measures displayed in this view are supported by their counterparts defined at the product and location level. Therefore, the calculated measures in this view are the result of aggregating the ones at the product and location intersection.

### User Valid Prod-Loc Filter

This is an editable measure to select a variant to be filtered. The views display only the selected variants.

**Asst. Var Start Date**

This is an editable measure to enter the variant's assortment start date.

**Asst. Var End Date**

This is an editable measure to enter the variant's assortment end date.

**Has Sales**

This is a calculated measure used to indicate whether a variant has sales data within IPOCS-Lifecycle Allocation and Replenishment or not. When selected, then at least one product within the variant would have sales, otherwise, there are no sales in IPOCS- Lifecycle Allocation and Replenishment for the variant.

**First Sales Date**

This is a calculated measure used to indicate the date of the first sale for the variant based on the loaded product and location daily sales. In this view, the variant's first sales date is the earliest date of all products, within the variant, sold in all the locations.

**Last Sales Date**

This is a calculated measure used to indicate the last sales date for the variant based on the loaded product and location daily sales. In this view, the variant's last sales date is the later date of all products, within the variant, sold in all the locations.

**Has Stock**

This is a calculated measure used to indicate whether a variant has inventory data within IPOCS-Lifecycle Allocation and Replenishment or not. When selected, then at least one product within the variant would have inventory in one location, otherwise, there is no inventory in IPOCS- Lifecycle Allocation and Replenishment for the variant.

**First Stock Date**

This is a calculated measure used to indicate the first inventory date for the variant based on the loaded product and location inventory. In this view, the variant's first inventory date is the earliest date of all the variant's products from all location inventories.

**Last Stock Date**

This is a calculated measure used to indicate the last inventory date for the location based on the loaded product and location inventory. In this view, the variant's last inventory date is the later date of all the variant's products from all location inventories.

**Asst. Prod-Loc Count**

This is a calculated measure used to indicate the total number of product and location combinations assorted. In this view, the measure displays the total number of locations assorted for all the products within the variant.

**Asst. Prod-Loc Active Count**

This is a calculated measure used to indicate the total number of product and location combinations assorted and still active. If the assortment end date has not been reached yet, then it is active. Otherwise, it is inactive, meaning that the assortment has already stopped. In this view, the measure displays the total number of locations assorted for all the products within the variant.

**Asst. Var-Loc Count**

This is a calculated measure used to indicate the total number of variant and location combinations assorted. In this view, the measure displays the total number of locations for the variant.

**Asst. Var-Loc Active Count**

This is a calculated measure used to indicate the total number of variant and location combinations assorted and still active. If the assortment end date has not been reached yet, for all products within the variance, then it is active. Otherwise, it is inactive meaning, that the assortment has already stopped. In this view, the measure displays the total number of locations for the variant.

**Asst. Var-Loc Start Date**

This is a calculated measure used to indicate the assortment start date for the assorted variance and location combinations. In this view, the measure displays the earliest date from all the locations assorted for the variance.

**Asst. Var-Loc End Date**

This is a calculated measure used to indicate the assortment end date for the assorted variance and location combinations. In this view, the measure displays the earliest date from all the locations assorted for the variance.

**Asst. Var-Loc from Start Dur (weeks)**

This is a calculated measure used to indicate the number of elapsed weeks since the assortment start date indicated in the measure Asst. Var-Loc Start Date. The number of weeks is calculated until the IPOCS-Lifecycle Allocation and Replenishment today's week.

**Lfc. Prod-Loc Exc.**

This is an editable measure to set a lifecycle exception for the variant (all products within) in all locations. Valid values are:

- Default  
This value ignores the lifecycle exception and keeps the default lifecycle result.
- On  
This value enables the exception and uses the exception dates for the lifecycle calculation.
- Off  
This value enables the exception and disables the variant for all products in all locations for the lifecycle calculation.

**Lfc. Prod-Loc Count**

This is a calculated measure used to indicate the total number of product and location combinations with a valid lifecycle. In this view, the measure displays the total number of valid lifecycles for all the products, within the variant, in all locations.

## Variant-Location View

The **Variant-Location View**, under the **Review Assortment tab**, and **By Parent tab**, allows you to review and manage the assortment but at the variant and location level only. The analysis is kept at variant level without the products within.

**Figure 12-14 Variant-Location View**

	User Valid Prod- Loc Filter	Asst. Var- Loc Def.	Asst. Var- Loc Exc.	Asst. Var- Loc Exc. Start Date	Asst. Var- Loc Exc. End Date	Plan Asst. Prod- Loc Start Date	Plan Asst. Prod- Loc End Date	Has
Franchise 01	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Default					
Franchise 02	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Default					
New Warehouse - User Journey	<input type="checkbox"/>	<input type="checkbox"/>	Default					
Outlet 01	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Default					
Outlet 02	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Default					
Outlet WH	<input type="checkbox"/>	<input type="checkbox"/>	Default					
Reg. DC	<input type="checkbox"/>	<input type="checkbox"/>	Default					
Store 001	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Default			01/06/2018	01/06/2021	
Store 002	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Default			12/29/2018		
Store 003	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Default			12/29/2018		
Store 004	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Default			12/29/2018		
Store 005	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Default			12/29/2018		
Store 006	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Default			12/29/2018		

**Measures: Variant-Location View**

The Variant-Location view contains the following measures.

**Note:**

The measures displayed in this view are supported by their counterparts defined at the product and location level. Therefore, the calculated measures in this view are the result of aggregating the ones at the product and location intersection.

**User Valid Prod-Loc Filter**

This is an editable measure to select variant and location combinations to be filtered. The views display only the selected variant and location combinations.

**Asst. Var-Loc Def**

This is a calculated measure used to indicate if the variant and location combinations are valid by default.

**Asst. Var-Loc Exc.**

This is an editable measure to set an assortment exception for the variant and location combinations. Valid values are:

- **Default**  
This value ignores the assortment exception and keeps the default assortment result.
- **On**  
This value enables the exception and uses the exception dates for the assortment calculation.
- **Off**



This value enables the exception and disables the variant and location combination for the assortment calculation.

**Asst. Var-Loc Exc. Start Date**

This is an editable measure to enter the assortment start date for the variant and location combination exception. When the exception is set to Default or On, this is the date used by the assortment calculation.

**Asst. Var-Loc Exc. End Date**

This is an editable measure to enter the assortment end date for the variant and location combination exception. When the exception is set to Default or On, this is the date used by the assortment calculation.

**Plan Asst. Prod-Loc Start Date**

This is a calculated measure used to indicate the planned assortment start date for the product and location combination. When there is an assortment start date exception the planned assortment start date is the exception. Otherwise, it is the assortment start date loaded from the external system. In this view, the measure displays the earliest date of all the products within the variant for the location.

**Plan Asst. Prod-Loc End Date**

This is a calculated measure used to indicate the planned assortment end date for the product and location combination. When there is an assortment end date exception the planned assortment end date is the exception. Otherwise, it is the assortment end date loaded from the external system. In this view, the measure displays the later date of all the products within the variant for the location.

**Has Sales**

This is a calculated measure used to indicate whether a variant and location combination has sales data within IPOCS-Lifecycle Allocation and Replenishment or not. When selected then at least one product, within the variant, has sales for the location. Otherwise, there are no sales in IPOCS-Lifecycle Allocation and Replenishment for the variant and location combination.

**First Sales Date**

This is a calculated measure used to indicate the first sales date for the variant and location combination based on the loaded product and location daily sales. In this view, the variant and location combination's first sales date is the earliest date of all products within the variant sold in the location.

**Last Sales Date**

This is a calculated measure used to indicate the last sales date for the variant and location combination based on the loaded product and location daily sales. In this view, the variant and location combination's last sales date is the later date of all products within the variant sold in the location.

**Has Stock**

This is a calculated measure used to indicate whether a variant and location combination has inventory data within IPOCS-Lifecycle Allocation and Replenishment or not. When selected then at least one product, within the variant, has inventory in the location. Otherwise, there is no inventory in IPOCS-Lifecycle Allocation and Replenishment for the variant and location combination.

**First Stock Date**

This is a calculated measure used to indicate the first inventory date for the variant and location combination based on the loaded product and location inventory. In this view, the variant and location combination's first inventory date is the earliest date of all products within the variant with inventory in the location.

**Last Stock Date**

This is a calculated measure used to indicate the last inventory date for the variant and location combination based on the loaded product and location inventory. In this view, the variant and location combination's last inventory date is the later date of all products within the variant with inventory in the location.

**Asst. Prod-Loc Count**

This is a calculated measure used to indicate the total number of product and location combinations assorted. In this view, the measure displays the total number of assorted products, within the variant, for the location.

**Asst. Prod-Loc Active Count**

This is a calculated measure used to indicate the total number of product and location combinations assorted and still active. If the assortment end date has not been reached yet then it is active. Otherwise, it is inactive, meaning that the assortment has already stopped. In this view, the measure displays the total number of active assorted products, within the variant, for the location.

**Asst. Var-Loc**

This is a calculated measure used to indicate whether the variant and location combinations are assorted or not. A variant and location combination is assorted if at least one product, within the variant, is assorted in the location.

**Asst. Var-Loc Active**

This is a calculated measure used to indicate whether the variant and location combinations are assorted and still active or not. If the assortment end date has not been reached yet, then it is active. A variant and location combination is assorted and active if at least one product, within the variant, is assorted and active in the location.

**Asst. Var-Loc Start Date**

This is a calculated measure used to indicate the assortment start date for the assorted variance and location combinations. In this view, the measure displays the earliest assortment start date of all assorted products, within the variant, for the location.

**Asst. Var-Loc End Date**

This is a calculated measure used to indicate the assortment end date for the assorted variance and location combinations. In this view, the measure displays the later assortment end date of all assorted products, within the variant, for the location.

**Asst. Var-Loc from Start Dur (weeks)**

This is a calculated measure used to indicate the number of elapsed weeks since the assortment started date indicated in the measure Asst. Var-Loc Start Date. The number the weeks are calculated until the IPOCS-Lifecycle Allocation and Replenishment today's week.

**Lfc. Prod-Loc Exc.**

This is an editable measure to set a lifecycle exception for the variant (all products within) and location combination. Valid values are:

- **Default**  
This value ignores the lifecycle exception and keeps the default lifecycle result.
- **On**  
This value enables the exception and uses the exception dates for the lifecycle calculation.
- **Off**  
This value enables the exception and disables the variant (all products within) and location combination for the lifecycle calculation.

### Lfc. Prod-Loc Count

This is a calculated measure used to indicate the total number of product and location combinations with a valid lifecycle. In this view, the measure displays the total number of valid lifecycles for all the products, within the variant, in the location.

## Variant-Location-Week View

The **Variant-Location-Week View**, under the **By Parent tab**, allows you to review the assortment week by week at the variant and location level.

**Figure 12-15 Variant-Location-Week View**

Measure	Location
Asst. Var-Loc-Wk	Great Lakes Region
Asst. Var-Loc-Wk Count	Great Lakes Region

### Measures: Variant-Location-Week View

The Variant-Location-Week view contains the following measures.

#### Asst. Var-Loc-Week

This is a calculated measure used to indicate for each week whether the variant and location combinations are assorted or not. A variant and location combination is assorted, for a particular week, if at least one product within the variant is assorted in the location for that same week.

#### Asst. Var-Loc-Week Count

This is a calculated measure used to indicate the total number of variant and location combinations assorted for each week.

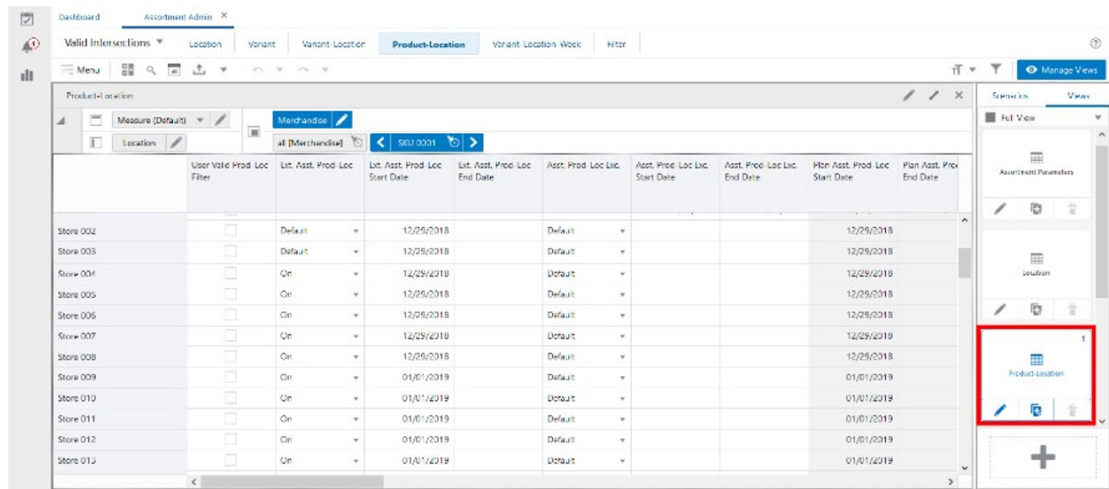
#### Asst. Var-Loc-Week

This is a calculated measure, not visible but available in the view for selection, to display the variant image and help you by having a visual assortment.

## Product-Location View

The **Product-Location View**, under the **By Item** tab, allows you to review and manage the assortment at the lowest level - product and location level.

**Figure 12-16 Product-Location View**



**Measures: Product-Location View**

The Product-Location view contains the following measures.

**User Valid Prod-Loc Filter**

This is an editable measure to select product and location combinations to be filtered. The views display only the selected product and location combinations.

**Ext Asst. Prod-Loc**

This is a measure loaded into IPOCS-Lifecycle Allocation and Replenishment to indicate whether a product and location combination is assorted or not. Valid values are:

- **Default**  
If the assortment dates are empty, but IPOCS-Lifecycle Allocation and Replenishment has sales or inventory data for the product and location combination, then IPOCS-Lifecycle Allocation and Replenishment assumes the product and location combination as assorted.
- **On**  
This value assumes the product and location combination as assorted and use the loaded assortment dates to assign the assortment start and end dates.
- **Off**  
This value assumes the product and location combination as not assorted even if there are assortment dates loaded.

**Ext Asst. Prod-Loc Start Date**

This is a measure loaded into IPOCS-Lifecycle Allocation and Replenishment to indicate the assortment start date for the product and location combination.

**Ext Asst. Prod-Loc End Date**

This is a measure loaded into IPOCS-Lifecycle Allocation and Replenishment to indicate the assortment end date for the product and location combination.

### **Asst. Var-Loc Exc.**

This is an editable measure to override the loaded assortment for the product and location combinations. Valid values are:

- Default

This value ignores the assortment exception and keeps the loaded assortment.

- On

This value overrides the loaded value. It forces the product and location combination to be assorted and uses the assortment exception dates to assign the assortment start and end dates. If no exception dates are entered by you and a loaded date exists, then IPOCS-Lifecycle Allocation and Replenishment uses the loaded assortment dates to assign the assortment start and end dates.

- Off

This value overrides the loaded value. It forces the product and location combination to be not assorted.

### **Asst. Var-Loc Exc. Start Date**

This is an editable measure to enter the assortment start date exception for the product and location combination. When the exception is set to Default or On, this is the date used by the assortment calculation.

### **Asst. Var-Loc Exc. End Date**

This is an editable measure to enter the assortment end date exception for the product and location combination. When the exception is set to Default or On, this is the date used by the assortment calculation.

### **Plan Asst. Prod-Loc Start Date**

This is a calculated measure used to indicate the planned assortment start date for the product and location combination. When there is an assortment start date exception the planned assortment start date is the exception. Otherwise, it is the assortment start date loaded from the external system.

### **Plan Asst. Prod-Loc End Date**

This is a calculated measure used to indicate the planned assortment end date for the product and location combination. When there is an assortment end date exception the planned assortment end date is the exception. Otherwise, it is the assortment end date loaded from the external system.

### **Has Sales**

This is a calculated measure used to indicate whether a product and location combination has sales data within IPOCS-Lifecycle Allocation and Replenishment or not. When selected then there are sales. Otherwise, there are no sales in IPOCS-Lifecycle Allocation and Replenishment for the product and location combination.

### **First Sales Date**

This is a calculated measure used to indicate the first sales date for the product and location combination based on the loaded product and location daily sales. The product and location combination's first sales date is the earliest date from the product and location combination sales.

### **Last Sales Date**

This is a calculated measure used to indicate the last sales date for the product and location combination based on the loaded product and location daily sales. The product and location combination's last sales date is the later date from the product and location combination sales.

### **Has Stock**

This is a calculated measure used to indicate whether a product and location combination has inventory data within IPOCS-Lifecycle Allocation and Replenishment or not. When selected then there is inventory. Otherwise, there is no inventory in IPOCS-Lifecycle Allocation and Replenishment for the product and location combination.

### **First Stock Date**

This is a calculated measure used to indicate the first inventory date for the product and location combination based on the loaded product and location inventory. The product and location combination's first inventory date is the earliest date from the product and location combination inventory.

### **Last Stock Date**

This is a calculated measure used to indicate the last inventory date for the product and location combination based on the loaded product and location inventory. The product and location combination's last inventory date is the later date from the product and location combination inventory.

### **Fixed TS Units 1**

This is a measure loaded into IPOCS-Lifecycle Allocation and Replenishment to indicate the initial allocation, in units, for the product and location combination.

### **Fixed TS Units 2**

This is an editable measure used to indicate a manual allocation for the product and location combination.

### **Fixed TS Units 3**

This is an editable/loadable measure that is a placeholder to indicate other allocations for the product and location combination. It can be loaded from another source system.

### **Asst. Prod-Loc**

This is a calculated measure used to indicate whether the product and location combinations are assorted or not.

### **Asst. Prod-Loc Active**

This is a calculated measure used to indicate whether the product and location combinations are assorted and still active or not. If the assortment end date has not been reached yet, then it is active. Otherwise, the product and location combination is assorted, but not active.

### **Asst. Prod-Loc Start Date**

This is a calculated measure used to indicate the assortment start date for the assorted product and location combinations. The date is calculated based on the option selected in the Assortment Parameters view.

### **Asst. Prod-Loc End Date**

This is a calculated measure used to indicate the assortment end date for the assorted product and location combinations. The date is calculated based on the option selected in the Assortment Parameters view.

#### **Lfc. Prod-Loc Def.**

This is a calculated measure to identify whether the product and location combination has a valid lifecycle by default or not.

#### **Lfc. Prod-Loc Exc.**

This is an editable measure to set a lifecycle exception for the product and location combination. Valid values are:

- **Default**  
This value ignores the lifecycle exception and keeps the default lifecycle result.
- **On**  
This value enables the exception and uses the lifecycle exception dates for the lifecycle calculation.
- **Off**  
This value enables the exception and disables the product and location combination for the lifecycle calculation.

#### **Lfc. Prod-Loc Validity Start Date**

This is an editable measure to enter the lifecycle start date exception for the product and location combination. This date overrides the lifecycle start date calculated in the Allocation & Replenishment Supply Chain Network workspace.

#### **Lfc. Prod-Loc Validity End Date**

This is an editable measure to enter the lifecycle end date exception for the product and location combination. This date overrides the lifecycle end date calculated in the Allocation & Replenishment Supply Chain Network workspace.

#### **Lfc. Prod-Loc**

This is a calculated measure to identify whether the product and location combination has a valid lifecycle or not. This measure takes into consideration the lifecycle exceptions. The exception takes priority over the Lfc. Prod-Loc Def.

#### **Lfc. Anchor Exc. Date**

This is an editable measure to enter the lifecycle anchor date exception for the product and location combination. This date overrides the lifecycle anchor date calculated in the Allocation & Replenishment Supply Chain Network workspace.

#### **Lfc. End Exc. Date**

This is an editable measure to enter the lifecycle's exception end date for the product and location combination. This date overrides the lifecycle anchor date calculated in the Allocation & Replenishment Supply Chain Network workspace.

## Product-Location-Week View

The **Product-Location-Week View**, under the **Actual Data tab**, allows you to review the sales and inventory actual data at the product, location, and week level.

**Figure 12-17 Product-Location-Week View**

	Actual PL Sales Day Units	Actual PL EOP Day Units
2019.06.24		
2019.06.25	7	
2019.06.26		
2019.06.27	20	
2019.06.28	6	
2019.06.29	6	
2019.06.30	8	
2019.07.01		
2019.07.02		
2019.07.03		
2019.07.04		
2019.07.05		
2019.07.06		
2019.07.07		

**Measures: Product-Location-Week View**

The Product-Location-Day view contains the following measures.

**Actual Loc. Sales Units**

This is a loaded measure used to indicate the total sales units for the day, product, and location combination.

**Loc. On Hand EOP Day**

This is a loaded measure used to indicate the closing inventory units for the day, product and location combination.

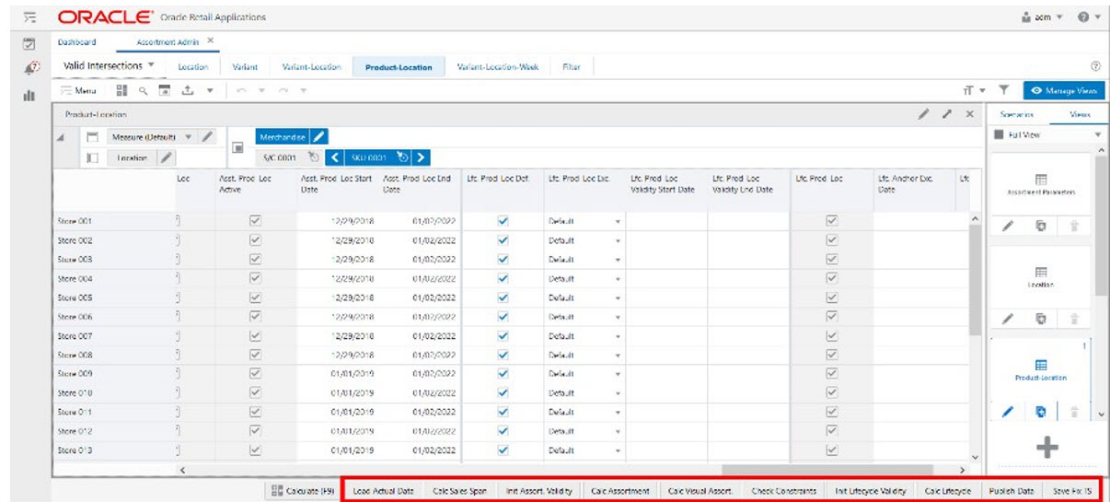
## Assortment Admin Action Buttons

The Assortment Admin workspace has the following action buttons available:

- Load Actual Data
- Calc Sales Span
- Calc Assortment
- Calc Lifecycle
- Publish Data



**Figure 12-18 Assortment Admin Action Buttons**



### Load Actual Data

This action button is responsible for loading the actual sales and actual inventory data. It populates the measures available in the Product-Location-Day view.

### Calc Sales Span

This action button is responsible for the calculation of the first and last selling dates of the item/location. The assortment calculation can use this information to get the start and end dates of the assortment.

### Calc Assortment

This action button is responsible for the assortment calculation. This action calculates the assortment start and end dates, using the rule selected by you in the view Assortment Parameters, and if the product and location combination is assorted or not.

### Calc Lifecycle

This action button is responsible for the lifecycle calculation. The measure Lfc. Prod-Loc, in the Product-Location view, is calculated and populated by this action button.

### Publish Data

This action button is responsible for committing all the measures managed within this workspace to be used by other IPOCS-Lifecycle Allocation and Replenishment processes and workspaces.

# 13

## Manage Alert Parameters

This chapter describes the functionality that allows you to review alerts and set up replenishment watch lists.

### Alerts Concept

Alerts are classified into two different types:

- Critical Alerts
- Non-Critical Alerts

IPOCS-Lifecycle Allocation and Replenishment uses the type of alert to know whether the generated orders can be auto-approved or should be reviewed or fixed by a user. When a product and location has an alert hit and that alert is a critical alert, then IPOCS-Lifecycle Allocation and Replenishment does not auto-approve the orders. You must review or fix the critical alert and then manually approve the orders, if needed. When a product and location combination has an alert hit and that alert is a non-critical alert, then it does not affect the approval of the orders. It is just an information to the users.

Additionally, alerts are also used to filter, within the Allocation and Replenishment Admin and Manage Databags workspaces, based on the product and location hits of the alert.

These alerts are available in IPOCS-Lifecycle Allocation and Replenishment:

- Replenishment Watch List
- SKU in Shortage
- Max Stockroom Min Display Max Display
- Future Promotions Maturity to EOL Recent Item Launch New SKU
- Shortage (Current) Overstock (Current) No Replenishment
- No Replenishment Method

## Manage Alert Parameters Workspace, Steps, and Views

The Manage Alert Parameters workspace allows you to maintain the description and type of each alert and review the alerts that have been triggered. You can also maintain the alert parameters in this workspace such as the Replenishment Watch-List.

The following table lists the workspaces, steps, and views of the Manage Alert Parameters task.

**Table 13-1 Manage Alert Parameters Workspace, Steps, and Views**

Workspace	Steps	Tab	Views
<a href="#">Manage Alert Parameters Workspace</a>	<a href="#">Label &amp; Review Step</a>	Label & Review	<a href="#">Label &amp; Review View</a>

**Table 13-1 (Cont.) Manage Alert Parameters Workspace, Steps, and Views**

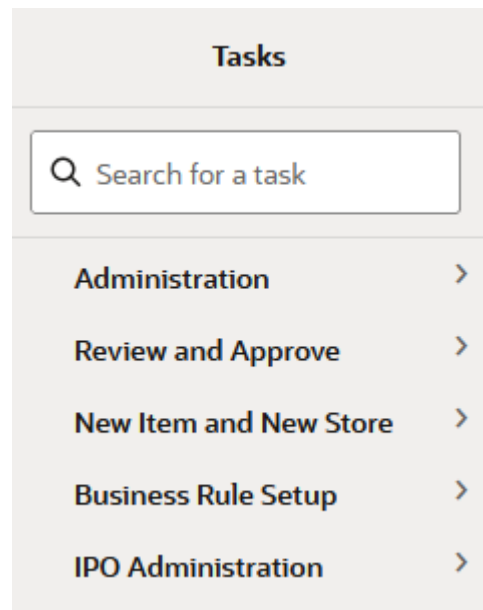
Workspace	Steps	Tab	Views
	Alert Parameters Step	Item-Location	Item-Location Alert Parameters View
		Parent- Location	Parent-Location Alert Parameters View
		Class-Region	Class-Region Alert Parameters View
		Partition- Location	Partition-Location Alert Parameters View
		Global	Global Alert Parameters View
	Alert Details Step	Alert by Item	Item Alerts View
		Alert by Item- Location	Item-Location Alerts View
		Alert Details	Alert Details View

## Manage Alert Parameters Workspace

To build the Manage Alert Parameters workspace, perform these steps:

1. From the left sidebar menu, click **Task Module** to view the available tasks.

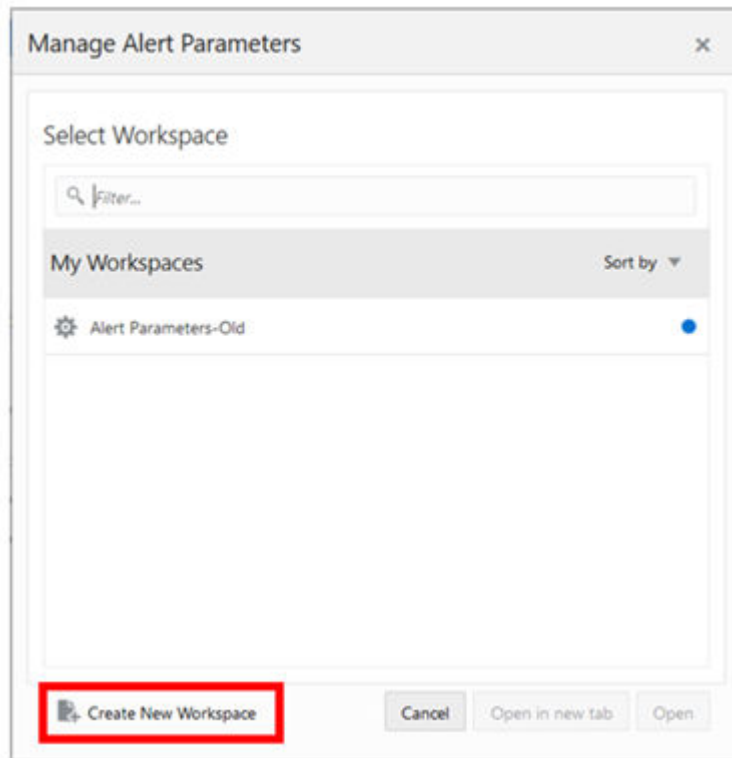
**Figure 13-1 Task Module**



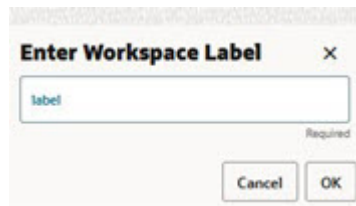
2. Click the **IPO Administration** activity and then click **Lifecycle Allocation and Replenishment** to access the available workspaces.
3. Click **Manage Alert Parameters**. The **Manage Alert Parameters** wizard opens.

4. You can open an existing workspace, but to create a new workspace, click **Create New Workspace**.

**Figure 13-2 Create New Workspace**

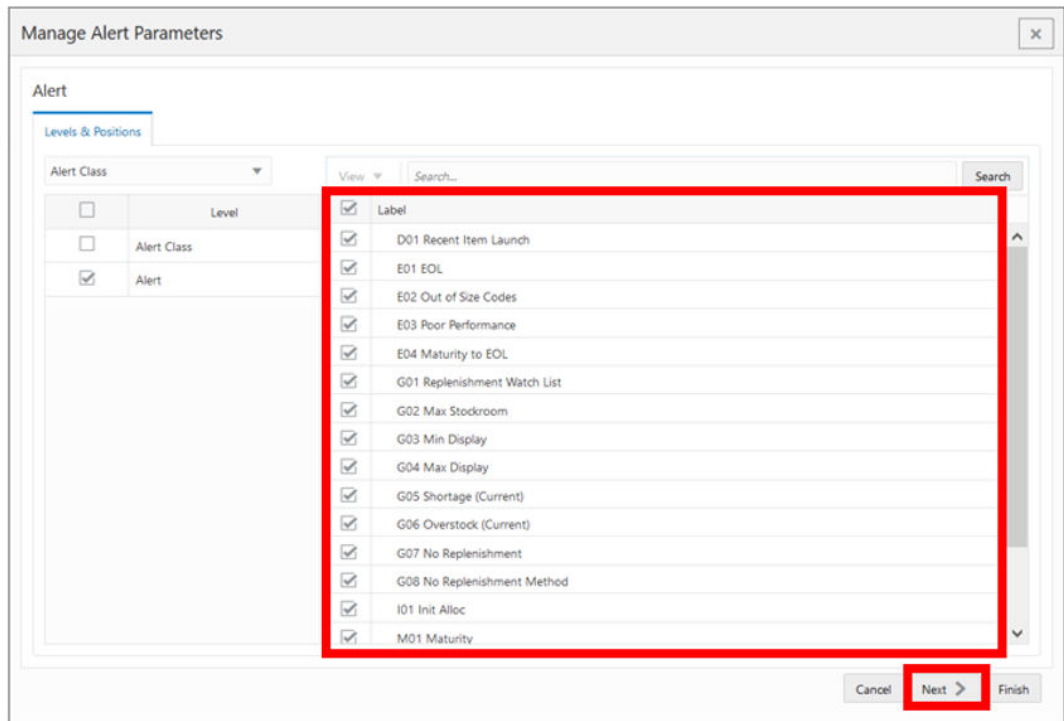


5. Enter a name for your new workspace in the label text box and click **OK**.



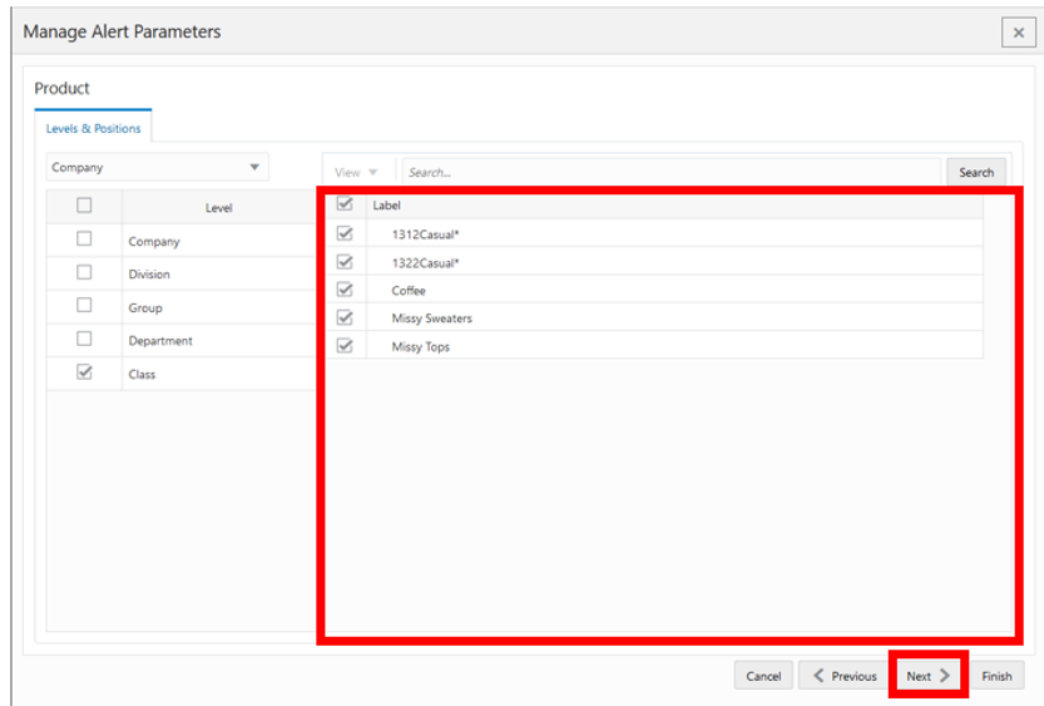
6. The Workspace wizard opens. Select the alerts you want to work with and click **Next**.

**Figure 13-3 Workspace Wizard: Select Alerts**



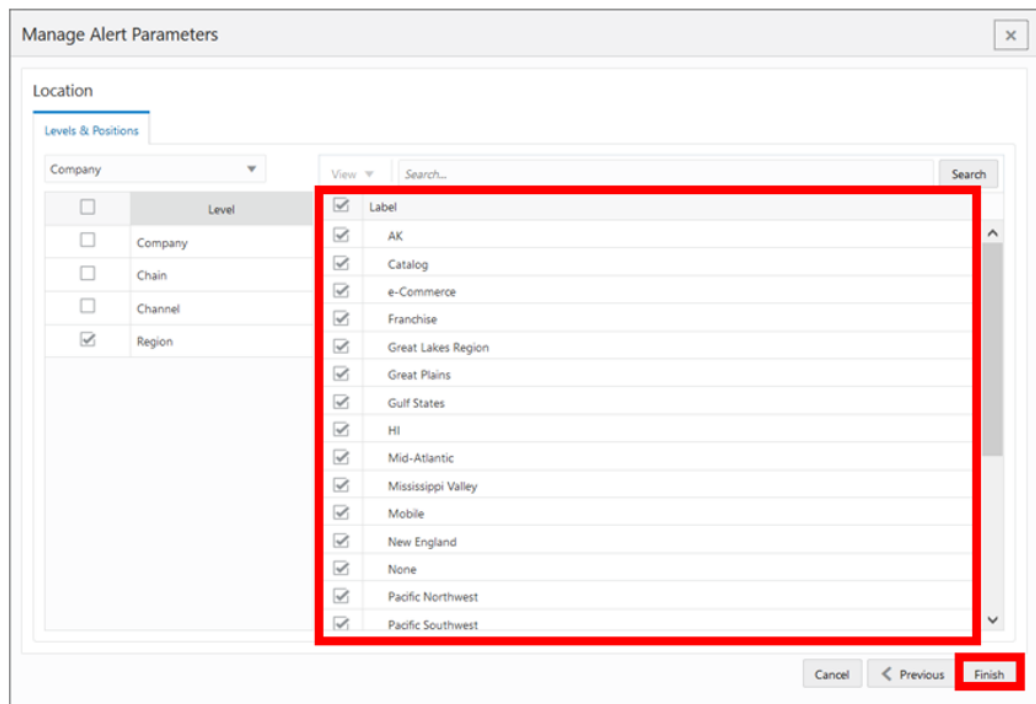
7. The Workspace wizard opens. Select the products you want to work with and click **Next**.

**Figure 13-4 Workspace Wizard: Select Product**



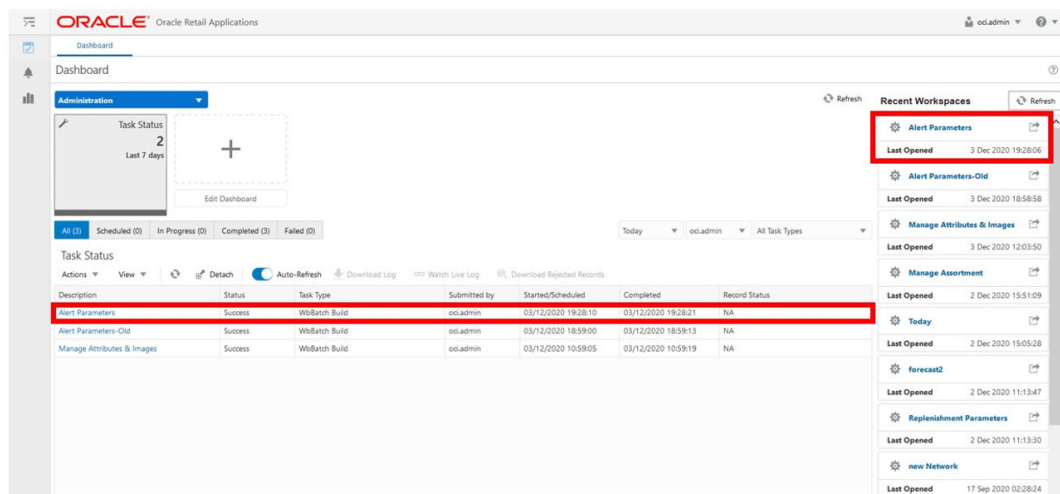
8. Select the locations you want to work with and click **Finish**.

Figure 13-5 Workspace Wizard: Select Location



9. The wizard notifies you that your workspace is being prepared. Successful workspaces are available from the Dashboard.

Figure 13-6 Successful Workspace Build: Manage Alert Parameters



## Label & Review Step

This step contains the Label & Review View.

## Label & Review View

The **Label & Review View**, under the **Label & Review tab**, allows you to set the alert as a critical or non-critical alert. Additionally, you can set a description for the alert and review alert details and hit counts per alert.

**Figure 13-7 Label & Review View**

Alert Description	Alert Short Descr.	Critical Alert	Enable RTA	Alert Type	Alert Priority	Alert Class	Alert PROD-LOC	Alert PROD-LOC %	Alert To-Be-Rev	Alert To-Be-Rev %
D01 Recent Item Launch	RecentItem	<input type="checkbox"/>	<input type="checkbox"/>	Replenishment	1 High	Workflow	1,605	1.4 %	1,605	1.4 %
E01 EOL		<input type="checkbox"/>	<input type="checkbox"/>	Replenishment	1 High	Workflow	1,260	1.1 %	1,260	1.1 %
E02 Out of Size Codes		<input type="checkbox"/>	<input type="checkbox"/>	Replenishment	1 High	Workflow	219	0.2 %	219	0.2 %
E03 Poor Performance		<input type="checkbox"/>	<input type="checkbox"/>	Replenishment	1 High	Workflow	45	0.0 %	45	0.0 %
E04 Maturity to EOL	Mat	<input type="checkbox"/>	<input type="checkbox"/>	Replenishment	1 High	Workflow	6	0.0 %	6	0.0 %
G01 Replenishment Watch List	Watch	<input type="checkbox"/>	<input type="checkbox"/>	Replenishment	1 High	Warning	73	0.1 %	73	0.1 %
G02 Max Stockroom	MaxStk	<input type="checkbox"/>	<input type="checkbox"/>	Replenishment	2 Medium	Workflow	1,232	1.1 %	1,232	1.1 %
G03 Min Display	MinDisp	<input type="checkbox"/>	<input type="checkbox"/>	Replenishment	2 Medium	Workflow	1,232	1.1 %	1,232	1.1 %
G04 Max Display	MaxDisp	<input type="checkbox"/>	<input type="checkbox"/>	Replenishment	2 Medium	Workflow		%		%
G05 Shortage (Current)	ShrtageCurr	<input type="checkbox"/>	<input type="checkbox"/>	Replenishment	1 High	Workflow	3,295	2.9 %	3,295	2.9 %
G06 Overstock (Current)	OverstCurr	<input type="checkbox"/>	<input type="checkbox"/>	Replenishment	1 High	Workflow	2,666	2.3 %	2,666	2.3 %
G07 No Replenishment	NoRpl	<input type="checkbox"/>	<input type="checkbox"/>	Replenishment	1 High	Workflow	2,457	2.1 %	2,457	2.1 %
G08 No Replenishment Method	NoRplMtd	<input type="checkbox"/>	<input type="checkbox"/>	Replenishment	1 High	Workflow		%		%
I01 Init Alloc		<input type="checkbox"/>	<input type="checkbox"/>	Replenishment	1 High	Workflow	1,299	1.1 %	1,299	1.1 %
M01 Maturity		<input type="checkbox"/>	<input type="checkbox"/>	Replenishment	1 High	Workflow	1,350	1.2 %	1,350	1.2 %

### Label & Review - Default Profile Measures

The Label & Review view contains the following measures.

#### Alert Description

This is an editable measure to define an alternative description for the alert. This Alert Description can be set as a Visible Attribute for the Alert hierarchy in all workspaces where the hierarchy is available.

#### Alert Short Descr. (Description)

This is an editable measure to define an alternative shortened description for the alert. This is the description that is displayed to you in the Replenishment workspaces and when reviewing the alerts.

#### Critical Alert

This is an editable measure to set an alert as a critical alert type. When selected, the alert is set as critical. Otherwise, the alert is non-critical.

#### Enable RTA

This is an editable measure to use the alert as an RPAS Real Time Alert (RTA) available in the workspace - **PROD Highlighted Alert** and **PROD-LOC Highlighted Alert**. If defined as RTA, the RPAS alert navigation mode for the RTA mentioned previously is possible and is based on the alert hits for the selected alert.

 **Note:**

When multiple alerts are selected for the Enable RTA, the RPAS Real Time Alert (RTA) considers all alerts that are enabled as RTA within the generic RTA available in the workspace. There is a measure available for each RTA to indicate what alerts are being captured by RTA.

**PROD Highlighted Alert**

When using the alert navigation mode, the alert uses the view PROD Alerts to navigate and the measure PROD Alerts displays with the list of alerts with hits for the product, PROD-LOC Highlighted Alert. When using alert navigation mode, this alert uses the view, PROD-LOC Alerts to navigate and the measure PROD-LOC Alerts displays with the list of alerts with hits for the product and location.

**Alert Type**

This is a calculated measure that indicates the alert type. The alert type is provided in the Alert hierarchy. By default, alerts are a Replenishment Alert Type.

**Alert Priority**

This is a calculated measure that indicates the priority of the alert. The alert priority is provided in the Alert hierarchy.

**Alert Class**

This is a calculated measure that indicates the alert class. The alert class is provided in the Alert hierarchy.

**Alert PROD-LOC Count**

This is a calculated measure that indicates the total number of products and locations with hits for the selected alert. For example, for the Shortage alert, the count represents the total number of products and locations with a stock shortage.

**Alert PROD-LOC %**

This is a calculated measure that indicates in percentage how much the alerted product and location represent in the total number of the assorted products and locations.

$$100 * \frac{PROD - LOCCount}{AssortedPROD - LOCCount}$$

**Alert To-Be-Rev PROD-LOC Count**

This is a calculated measure that indicates the total number of products and locations with alert hits, out of the Alert PROD-LOC Count, that still need to be reviewed by you.

**Alert To-Be-Rev PROD-LOC %**

This is a calculated measure that indicates in percentages how much the alerted products and locations have yet to be reviewed and represents the total of the assorted products and locations.



$$100 \frac{* \text{AlertTo} - \text{Be} - \text{RevPROD} - \text{LOCCount}}{\text{AssortedPROD} - \text{LOCCount}}$$

**Alert VAR-LOC Count**

This is a calculated measure that indicates the total number of variant and location with hits for the selected alert.

**Alert To-Be-Rev VAR-LOC Count**

This is a calculated measure that indicates the total number of variant and location with alert hits, out of the Alert VAR-LOC Count, that still need to be reviewed by you.

**Alert VAR Count**

This is a calculated measure that indicates the total number of variants with hits for the selected alert. For example, for a Shortage alert, the count represents the total number of variant with stock shortage (if it has a shortage in at least one location, then it counts).

**Alert To-Be-Rev VAR Count**

This is a calculated measure that indicates the total number of variants with alert hits, out of the Alert VAR Count, that still need to be reviewed by you.

**Alert LOC Count**

This is a calculated measure that indicates the total number of locations with hits for the selected alert. For example, for a Shortage alert, the count represents the total number of locations with a stock shortage (if it has a shortage in at least one assorted product, then it counts).

**Alert To-Be-Rev LOC Count**

This is a calculated measure that indicates the total number of locations with alert hits, out of the Alert LOC Count, that still need to be reviewed by you.

## Alert Parameters Step

In this step you can set up and review the alert parameters. This step contains the following views:

- [Item-Location Alert Parameters View](#)
- [Parent-Location Alert Parameters View](#)
- [Class-Region Alert Parameters View](#)
- [Partition-Location Alert Parameters View](#)

### Item-Location Alert Parameters View

The **Item-Location Alert Parameters View**, under the **Item-Location** tab, allows you to review and set up the replenishment watch list alert for the product-location combinations.

**Figure 13-8 Item-Location Alert Parameters View**

Product	1000 Web	1001 Atlanta	1002 Dallas	1003 Boston	1004 New York	1005 Philadelphia	1006 Chicago	1007 Minneapolis	1008 St. Louis	1009 Albuquerque	1010 Los Angeles
1234582 - Folgers - Breakfast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1234600 - Maxwell House -	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1234615 - Maxwell House -	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1234747 - Folgers - 100%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1234753 - Folgers - Dark Roast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1234759 - Folgers - Medium	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1234762 - Folgers - Breakfast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1234765 - Folgers - French	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1234768 - PL - 100%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1234769 - PL - French Roast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1234770 - PL - French Roast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1234771 - PL - Breakfast Roast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1234772 - PL - Medium Roast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1234773 - PL - Dark Roast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1234774 - PL - French Roast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Item-Location Alert Parameters - Default Profile Measures

The Item-Location Alert Parameters view contains the following measure.

#### Repl Watch List

This is an editable measure used to indicate the product-location combinations that should be included or removed from the replenishment watch list. This information is used by the Repl Watch List alert to notify you of the product-location if it generates orders. If the measure is selected, it means that the product-location combination is included in the watch list. Otherwise, the product-location combination is excluded from the watch list.

## Parent-Location Alert Parameters View

The **Parent-Location Alert Parameters View**, under the **Parent-Location** tab, allows you to review and set up the forecast watch list for the parent-location combinations.

Figure 13-9 Parent-Location Alert Parameters View

### Parent-Location Alert Parameters - Default Profile Measures

The Parent-Location Alert Parameters view contains the following measure.

#### Fcst Watch List

The Forecast Watch List is an editable measure used to indicate the product-location combinations that should be included or removed from the forecast watch list. This information is used by the Forecast Watch List alert to notify you of the product-location if they generate orders. If the measure is selected, it means that the product-location combination is included in the watch list. Otherwise, the product-location combination is excluded from the watch list.

## Class-Region Alert Parameters View

The **Class-Region Alert Parameters View**, under the **Class-Region** tab, allows you to review and set up the thresholds to be used by the stock alerts. You can set up thresholds in both percentage and units. These values are considered when triggering the shortage and overstock alerts.

Figure 13-10 Class-Region Alert Parameters View

	AK					Catalog				
	1312Casual*	1322Casual*	Coffee	Missy Sweaters	Missy Tops	1312Casual*	1322Casual*	Coffee	Missy Sweaters	Missy Tops
Shortage (Current) Threshold %	%	%	%	%	%	%	%	%	%	%
Shortage (Current) Threshold Units										
Overstock (Current) Threshold %	%	%	%	%	%	%	%	%	%	%
Overstock (Current) Threshold Units										

### Class-Region Alert Parameters - Default Profile Measures

The Class-Region Alert Parameters view contains the following measures.

#### Shortage (Current) Threshold %

This is an editable measure used to define the threshold in percentage to be considered by the stock shortage alert calculations.

#### Shortage (Current) Threshold Units

This is an editable measure used to define the threshold in units to be considered by the stock shortage alert calculations.

#### Overstock (Current) Threshold %

This is an editable measure used to define the threshold in percentage to be considered by the overstock alert calculations.

#### Overstock (Current) Threshold Units

This is an editable measure used to define the threshold in units to be considered by the overstock alert calculations.

## Partition-Location Alert Parameters View

The **Partition-Location Alert Parameter View**, under the **Partition-Location** tab, allows you to set up and review the parameters to be used by the min display, max display, and max stockroom thresholds.

**Figure 13-11 Partition-Location Alert Parameters View**

	1000 Web	1001 Atlanta	1002 Dallas	1003 Boston	1004 New York	1005 Philadelphia	1006 Chicago	1007 Minneapolis	1008 St. Louis	1009 Albuquerque	1010 Los Angeles	1022
Min Display Space Count	15					15						
Max Display Space Count	27											
Max Stockroom Space	350.00					350.00						

### Partition-Location Alert Parameters - Default Profile Measures

The Partition-Location Alert Parameters view contains the following measures.

#### Min Display Space Count

This is an editable measure used to enter the minimum amount of products, for the merchandise level, that should be in the display at the location. This value is then used by the alerts to alert you if locations are not reaching their minimum display for certain merchandise.

### Max Display Space Count

This is an editable measure used to enter the maximum amount of products, for the merchandise level, that can be in the display at the location. This value is then used by the alerts to alert you if locations are exceeding their maximum display for certain merchandise.

### Max Stockroom Space

This is an editable measure used to enter the maximum inventory units, for the merchandise level, that can be stocked at the location. This value is then used by the alerts to alert you if locations are reaching or exceeding their maximum stock capacity for certain merchandise.

## Global Alert Parameters View

The **Global Alert Parameters View**, under the **Global tab** allows you to review and set up all alert measure parameters that have no dimension attached, however, this function is no longer available and has been deprecated in this release.

**Figure 13-12 Global Alert Parameters View**

Parameter	Value
Outlier Horizon Dur (weeks)	4.0 w
Baseline vs LY Min %	%
Baseline vs LY Max %	%
Baseline vs LY Horizon Dur (weeks)	4.0 w
Min MAPE %	%
Max MAPE %	%
Recent Item Launch X Dur (weeks)	0.0 w

## Alert Details Step

In this step, you can review the alert hits by product and by product and location. This step contains these views:

- [Item-Alerts-View](#)
- [Item-Location-Alerts-View](#)
- [Alert-Details-View](#)

## Item Alerts View

The **Item Alerts View**, under the **Alert by Item** tab, allows you to review at the product level what alerts are being triggered for each product. The alert short description is used to display to you the alerts being triggered.

The navigation of this view is very conveniently driven by the real-time alerts or workspace alerts.

**Figure 13-13 Item Alerts View**

Product	PROD Alerts	PROD Real Time Alert	VAR Real Time Alert
1234582 - Folgers - Breakfast	OvrstCurr	---	---
1234600 - Maxwell House -	OvrstCurr	---	---
1234615 - Maxwell House -	OvrstCurr	---	---
1234747 - Folgers - 100%	OvrstCurr	---	---
1234753 - Folgers - Dark Roast	OvrstCurr	---	---
1234759 - Folgers - Medium	OvrstCurr	---	---
1234762 - Folgers - Breakfast	OvrstCurr	---	---
1234765 - Folgers - French	OvrstCurr	---	---
1234768 - PL - 100%	OvrstCurr	---	---
1234769 - PL - French Roast	OvrstCurr	---	---
1234770 - PL - French Roast	OvrstCurr	---	---
1234771 - PL - Breakfast Roast	OvrstCurr	---	---
1234772 - PL - Medium Roast	OvrstCurr	---	---
1234773 - PL - Dark Roast	OvrstCurr	---	---
1234774 - PL - French Roast	OvrstCurr	---	---
1234775 - PL - Breakfast Roast	OvrstCurr	---	---

### Item Alerts View - Default Profile Measures

The Item Alerts view contains the following measures.

#### PROD Alerts

This is a calculated measure that contains the alert that was triggered for the product. It uses the alert short description to display the triggered alert. If multiple alerts are triggered for the same product then this measure displays all the alerts triggered.



#### Note:

If no short description is provided in the Label & Review view for the alert, then the alert does not display in this measure. Because the alert short description is empty, you are unable to see the alert even if it is triggered.

#### PROD Real Time Alert

This is a calculated measure used to identify the product with triggered alerts where the option Real Time Alert (RTA) is enabled in the Label & Review view. When the alert has the option RTA active, this measure is populated with the keyword highlighted to identify the products that should be considered by the RTA. If the RTA is unavailable for the alert, this measure is empty.

#### VAR Real Time Alert

This is a calculated measure used to identify the product at the variant level with triggered alerts where the option Real Time Alert (RTA) is enabled in the Label & Review view. When the alert has the option RTA active, this measure is populated with the keyword highlighted to

identify the products that should be considered by RTA. If the RTA is unavailable, this measure is empty.

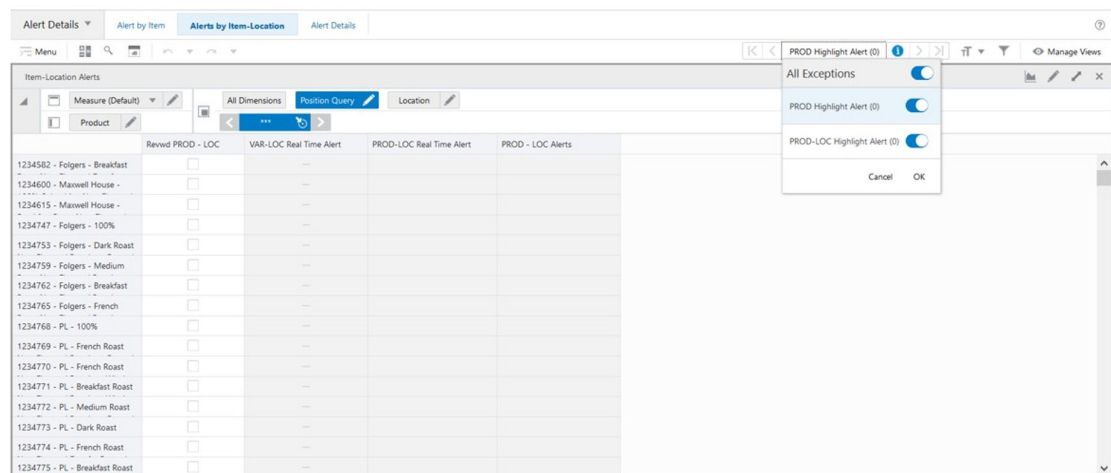
 **Note:**

When the view is not displaying the variant level or higher, this measure displays "-" to indicate you that the measure is not available at that level. You will need to modify the base intersection level displayed to view the value.

## Item-Location Alerts View

The **Item-Location Alerts View**, under the **Alert by Item-Location** tab, allows you to review at the product and location levels what alerts are being triggered for that combination. The alert short description is the one used to display to you what alert is being triggered. The navigation of this view is conveniently driven by the real-time alerts or workspace alerts.

**Figure 13-14 Item-Location Alerts View**



### Item-Location Alerts - Default Profile Measures

The Item-Location Alerts view contains the following measures.

#### Revwd PROD - LOC

This is an editable measure used to indicate that the product-location combination has been reviewed. When selected, IPOCS-Lifecycle Allocation and Replenishment assumes the combination as reviewed. Otherwise, it assumes the combination is still to be reviewed.

#### VAR-LOC Real Time Alert

This is a calculated measure used to identify the variant-location combination with triggered alerts where the option Real Time Alert (RTA) is enabled in the Label & Review view. When the alert has the option RTA active, this measure is populated with the keyword highlighted to identify the variant-location combinations that should be considered by the RTA. If the RTA is unavailable for the alert, this measure is empty.

#### PROD-LOC Real Time Alert

This is a calculated measure used to identify the product-location combination with triggered alerts where the option Real Time Alert (RTA) is enabled in the Label & Review view. When the alert has the option RTA active, this measure is populated with the keyword highlighted to identify the product-location combinations that should be considered by the RTA. If the RTA is unavailable for the alert, this measure is empty.

### PROD-LOC Alerts

This is a calculated measure that contains the alert that was triggered for the product-location combination. It uses the alert short description to display the triggered alert. If multiple alerts are triggered for the same product-location combination, this measure displays all of the triggered alerts.

## Alert Details View

The **Alert Details View**, under the **Alert Details tab**, allows you to review per alert what product-location combinations are triggered. You can also check what product-locations are still pending review.

**Figure 13-15 Alert Details View**

Product	Alert PROD-LOC	Alert To-Be-Rev PROD-LOC
1234582 - Folgers - Breakfast	<input type="checkbox"/>	<input type="checkbox"/>
1234600 - Maxwell House -	<input type="checkbox"/>	<input type="checkbox"/>
1234615 - Maxwell House -	<input type="checkbox"/>	<input type="checkbox"/>
1234747 - Folgers - 100%	<input type="checkbox"/>	<input type="checkbox"/>
1234753 - Folgers - Dark Roast	<input type="checkbox"/>	<input type="checkbox"/>
1234759 - Folgers - Medium	<input type="checkbox"/>	<input type="checkbox"/>
1234762 - Folgers - Breakfast	<input type="checkbox"/>	<input type="checkbox"/>
1234765 - Folgers - French	<input type="checkbox"/>	<input type="checkbox"/>
1234768 - PL - 100%	<input type="checkbox"/>	<input type="checkbox"/>
1234769 - PL - French Roast	<input type="checkbox"/>	<input type="checkbox"/>
1234770 - PL - French Roast	<input type="checkbox"/>	<input type="checkbox"/>
1234771 - PL - Breakfast Roast	<input type="checkbox"/>	<input type="checkbox"/>
1234772 - PL - Medium Roast	<input type="checkbox"/>	<input type="checkbox"/>
1234773 - PL - Dark Roast	<input type="checkbox"/>	<input type="checkbox"/>
1234774 - PL - French Roast	<input type="checkbox"/>	<input type="checkbox"/>
1234775 - PL - Breakfast Roast	<input type="checkbox"/>	<input type="checkbox"/>

### Alert Details View - Default Profile Measures

The Alert Details view contains the following measures.

#### Alert PROD-LOC

This is a calculated measure that indicates what product-locations have been triggered for the alert.

#### Alert To-Be-Rev PROD-LOC

This is a calculated measure that indicates what product-locations have been triggered by an alert and still need to be reviewed by you. When selected, you still need to review the product-location combination. When clear, you have reviewed the product-location combination already or the product-location combination has not been triggered by an alert.



# 14

## Manage Scaling Parameters

This chapter describes the functionality that allows users to manage scaling parameters.

### Manage Scaling Parameters Workspace, Steps, and Views

The Manage Scaling Parameters workspace allows you to adjust or expand inventory levels to meet changing demands or business needs.

The following table lists the workspaces, steps, and views of the Manage Scaling Parameters task.

**Table 14-1 Manage Scaling Parameters Workspace, Steps, and Views**

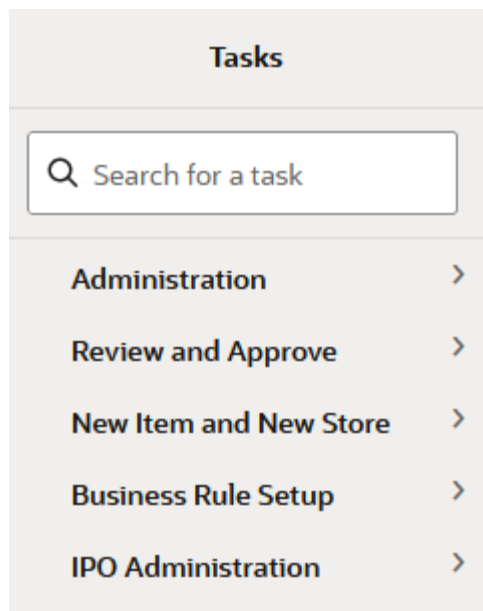
Workspace	Steps	Tab	Views
Manage Scaling Parameters Workspace	Manage Scaling Parameters Step	Manage Scaling Parameters	Constraint Groups View
			Constraints View
			Constraints PROD-LOC Association View

### Manage Scaling Parameters Workspace

To build the Manage Scaling Parameters workspace, perform these steps:

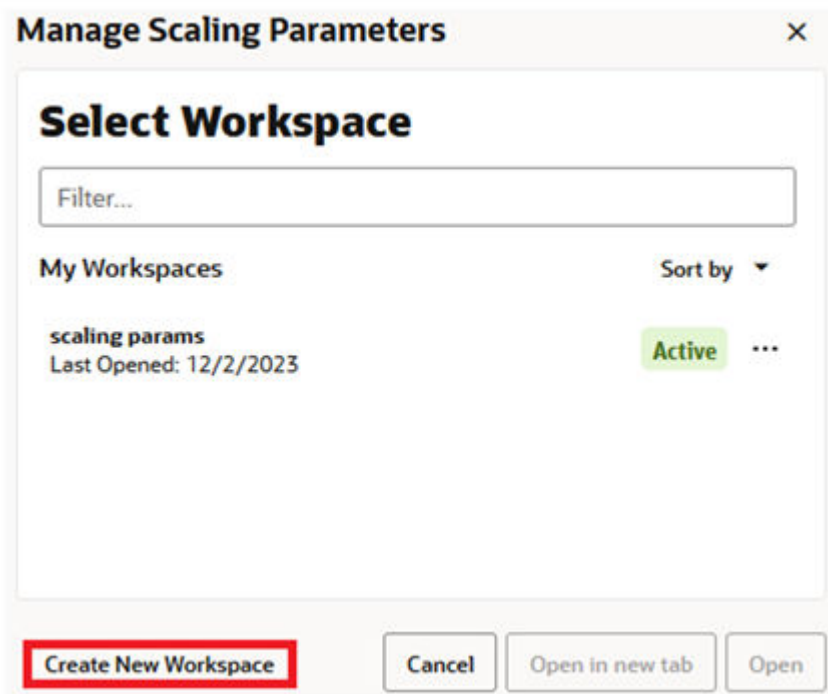
1. From the left sidebar menu, click **Task Module** to view the available tasks.

Figure 14-1 Task Module

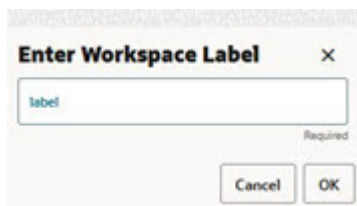


2. Click the **IPO Administration** activity and then click **Lifecycle Allocation and Replenishment** to access the available workspaces.
3. Click **Manage Scaling Parameters**. The **Manage Scaling Parameters** wizard opens.
4. You can open an existing workspace, but to create a new workspace, click **Create New Workspace**.

Figure 14-2 Create New Workspace

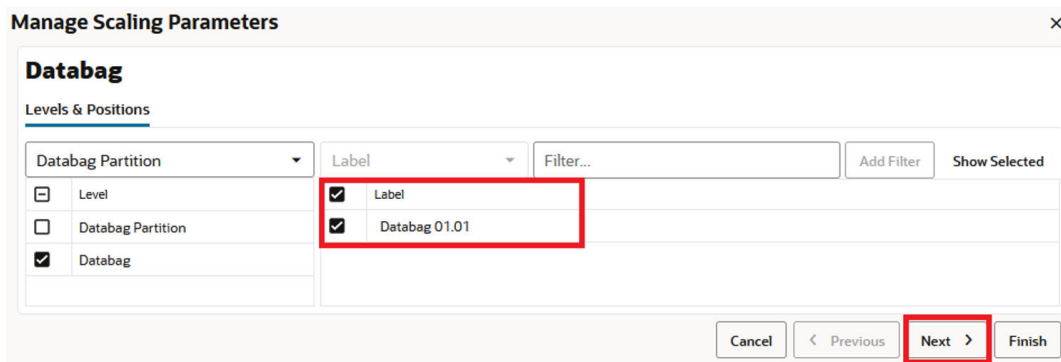


5. Enter a name for your new workspace in the label text box and click **OK**.



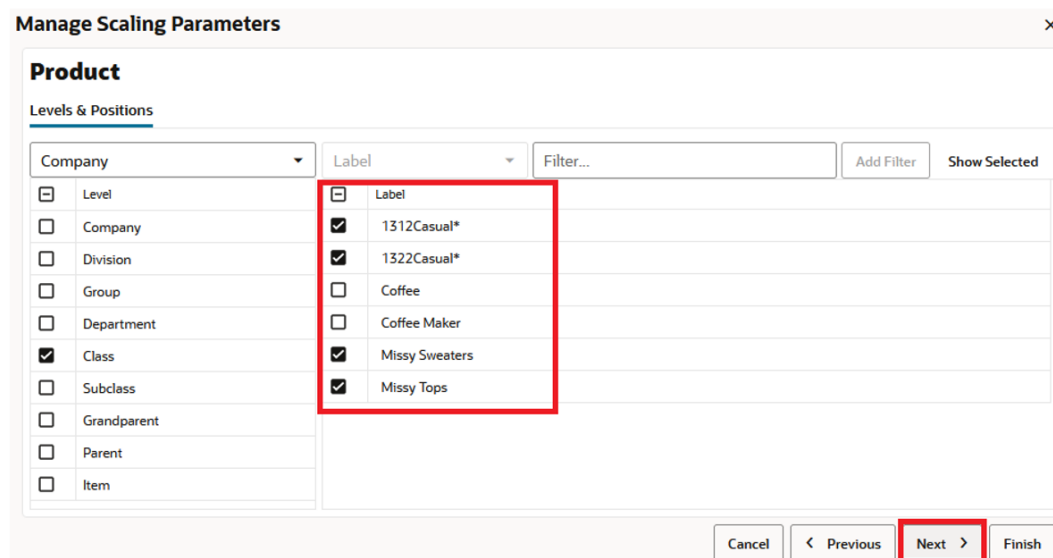
6. The Workspace wizard opens. Select the databags you want to work with and click **Next**.

**Figure 14-3 Workspace Wizard: Select Databags**



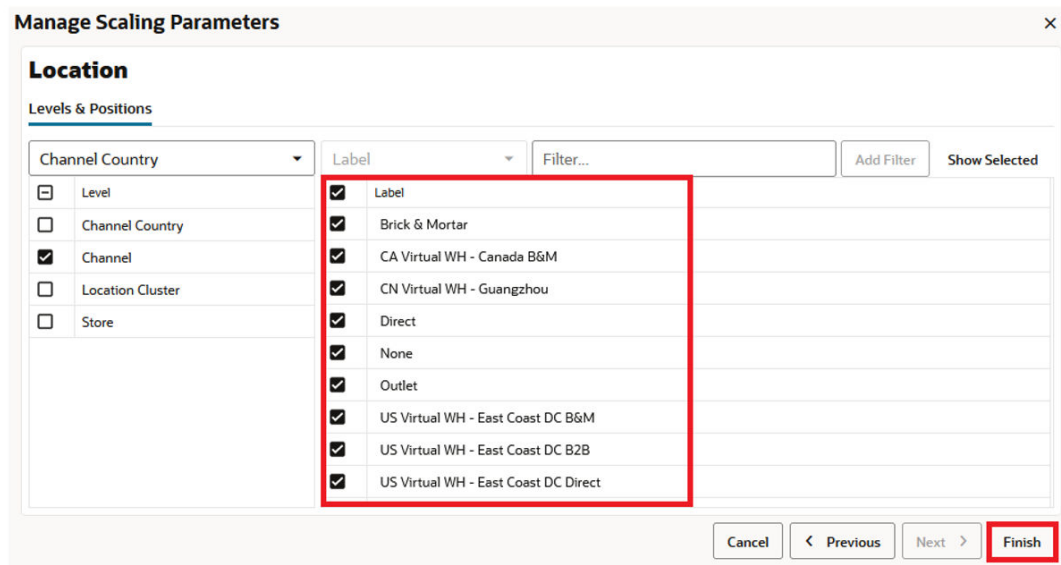
7. The Workspace wizard opens. Select the products you want to work with and click **Next**.

**Figure 14-4 Workspace Wizard: Select Product**



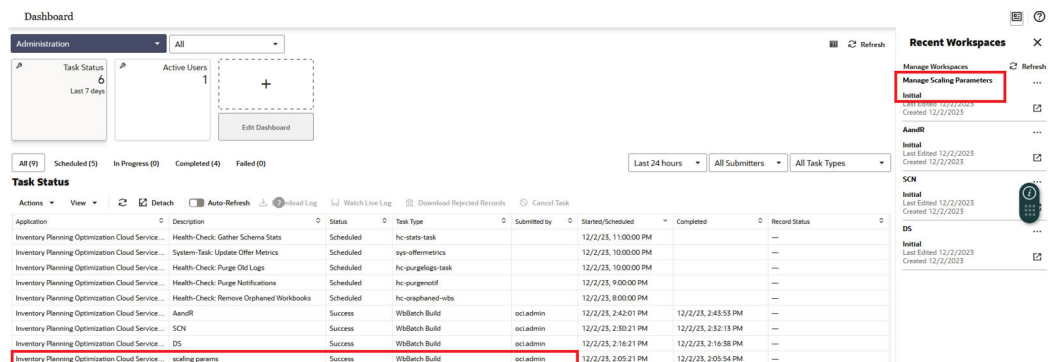
8. Select the locations you want to work with and click **Finish**.

Figure 14-5 Workspace Wizard: Select Location



- The wizard notifies you that your workspace is being prepared. Successful workspaces are available from the Dashboard.

Figure 14-6 Successful Workspace Build: Manage Scaling Parameters



## Manage Scaling Parameters Step

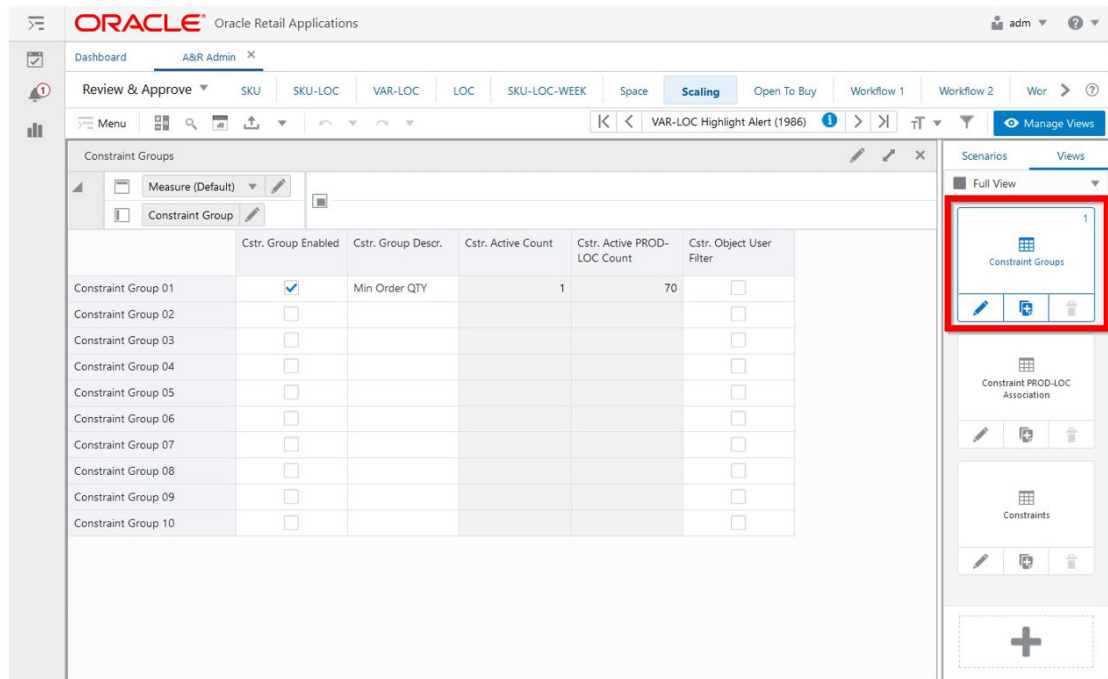
The Manage Scaling Parameters workspace consists of these views:

- [Constraint Groups View](#)
- [Constraints View](#)
- [Constraint PROD-LOC Association View](#)

### Constraint Groups View

The **Constraint Groups View**, under the **Scaling tab**, allows you to define a constraint group to be set up to configure constraints to be applied to product and location combinations.

**Figure 14-7 Constraint Groups View**



### Constraint Groups View - Default Profile Measures

The default measure profile available in the Constraint Groups view contains the following measures.

#### Cstr. Group Enabled

Constraint Group Enabled is an editable measure to enable or disable a constraint group. Each row (or list) represents a different constraint group.

#### Cstr. Group Descr.

Constraint Group Description is an editable measure to enter a user-defined constraint group description.

#### Cstr. Active Count

Constraint Active Count is a calculated measure to display the total number of constraints in use (active) for the constraint group.

#### Cstr. Active PROD-LOC Count

Constraint Active PROD-LOC Count is a calculated measure that displays the total number of product and location combinations that are associated with an active constraints within the constraint group. For example, if the constraint group has two active constraints being applied to product and location combinations then this value is the total of both.

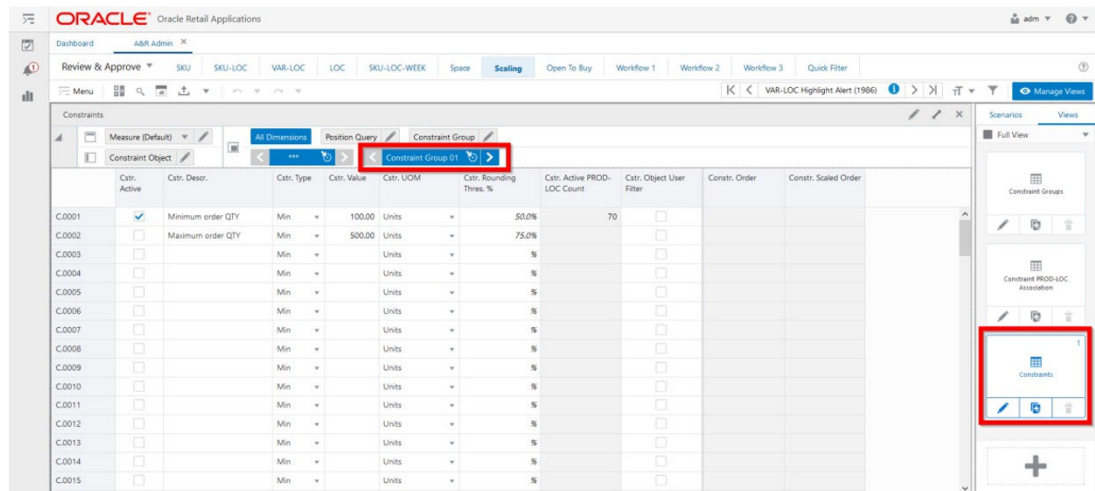
#### Cstr. Object User Filter

Constraint Object User Filter is an editable measure to select the constraint group to filter the views within the Allocation and Replenishment workspace. When selected, and after the workspace calculation (either **Calculate** or **F9**) is run, the views in the Allocation and Replenishment workspace are filtered based on the product and locations associated with active constraints within the selected constraint groups.

## Constraints View

The **Constraints View**, under the **Scaling tab**, allows you to define the constraints, within a constraint group, that is used by the scaling process. This is the view where the constraint parameters are set (for example, a minimum order quantity of 500 units).

**Figure 14-8 Constraints View**



### Constraints View - Default Profile Measures

The default measure profile available in the Constraints view contains the following measures.

#### Cstr. Active

Constraint Active is an editable measure to enable or disable a constraint within the constraint group. Each row (or list) represents a different constraint.

#### Cstr. Descr.

Constraint Description is an editable measure to enter a user-defined constraint description.

#### Cstr. Type

Constraint Type is an editable measure to select the type of constraint being defined. Valid values are:

- Min  
When the constraint is for minimum order quantity.
- Multiple  
When the constraint is for multiple order quantity.

#### Cstr. Descr.

Constraint Description is an editable measure to enter the value for the constraint related to the selected type (Cstr. Type). For example, if the constraint is for a minimum order quantity, then this measure holds the number of units (for example, 500).

#### Cstr. Rounding Thres. %

Constraint Rounding Threshold Percentage is an editable measure to enter the threshold percentage to be used in the scaling calculation to know if the suggested order is either scaled up or scaled down.

#### **Cstr. Active PROD-LOC Count**

Constraint Active Product-Location Count is a calculated measure to display the total number of product and location combinations that are associated with the constraint.

#### **Cstr. Object User Filter**

Constraint Object User Filter is an editable measure to select the constraint to filter the views within the Allocation and Replenishment workspace. When selected, and after the workspace calculation (either **Calculate** or **F9**) is run, the views in the Allocation and Replenishment workspace are filtered based on the product and locations associated within the selected constraints.

#### **Constr. Order**

Constraint Order is a calculated measure to display the total order, in the selected Unit of Measurement (UOM), for the items associated with the constraint. By default IPOCS-Lifecycle Allocation and Replenishment uses units and the value displayed is the suggested replenishment units calculated by IPOCS-Lifecycle Allocation and Replenishment. When you select a different UOM, then the UOM conversion factor is used to convert the suggested replenishment units into the selected UOM.

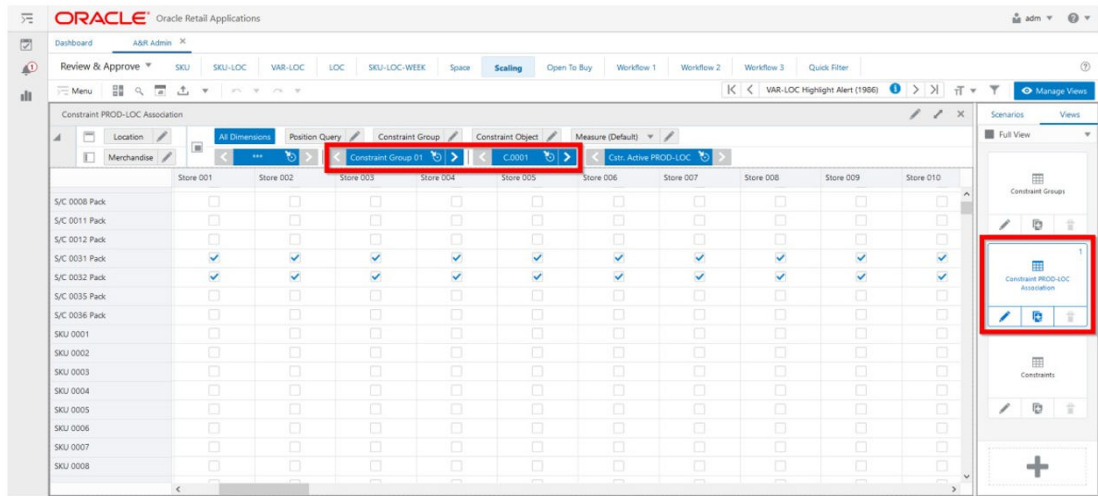
#### **Constr. Scaled Order**

Constraint Scaled Order is a calculated measure to display the total order after the scaling is run for the selected UOM and for the items associated with the constraint. By default, IPOCS-Lifecycle Allocation and Replenishment uses units and the value displayed is the result of the scaling applied to the suggested replenishment units calculated by IPOCS-Lifecycle Allocation and Replenishment. When you select a different UOM, then the UOM conversion factor is used to convert into the selected UOM the result of the scaling applied to the suggested replenishment units.

## Constraints PROD-LOC Association View

The **Constraints PROD-LOC Association View**, under the **Scaling tab**, allows you to select the product and location combinations to be included in each constraint that is used by the scaling process.

**Figure 14-9 Constraints PROD-LOC Association View**



**Constraints PROD-LOC Association View - Default Profile Measures**

The default measure profile available in the Constraints PROD-LOC Association view contains the following measure.

**Cstr. Active PROD-LOC**

Constraint Active Product-Location is an editable measure to associate a product and location combination to the constraint. When selected, the product and location combination is associated with the constraint and is used by the scaling process. When not selected, the product and location combination is not associated.



# 15

## Manage Databags

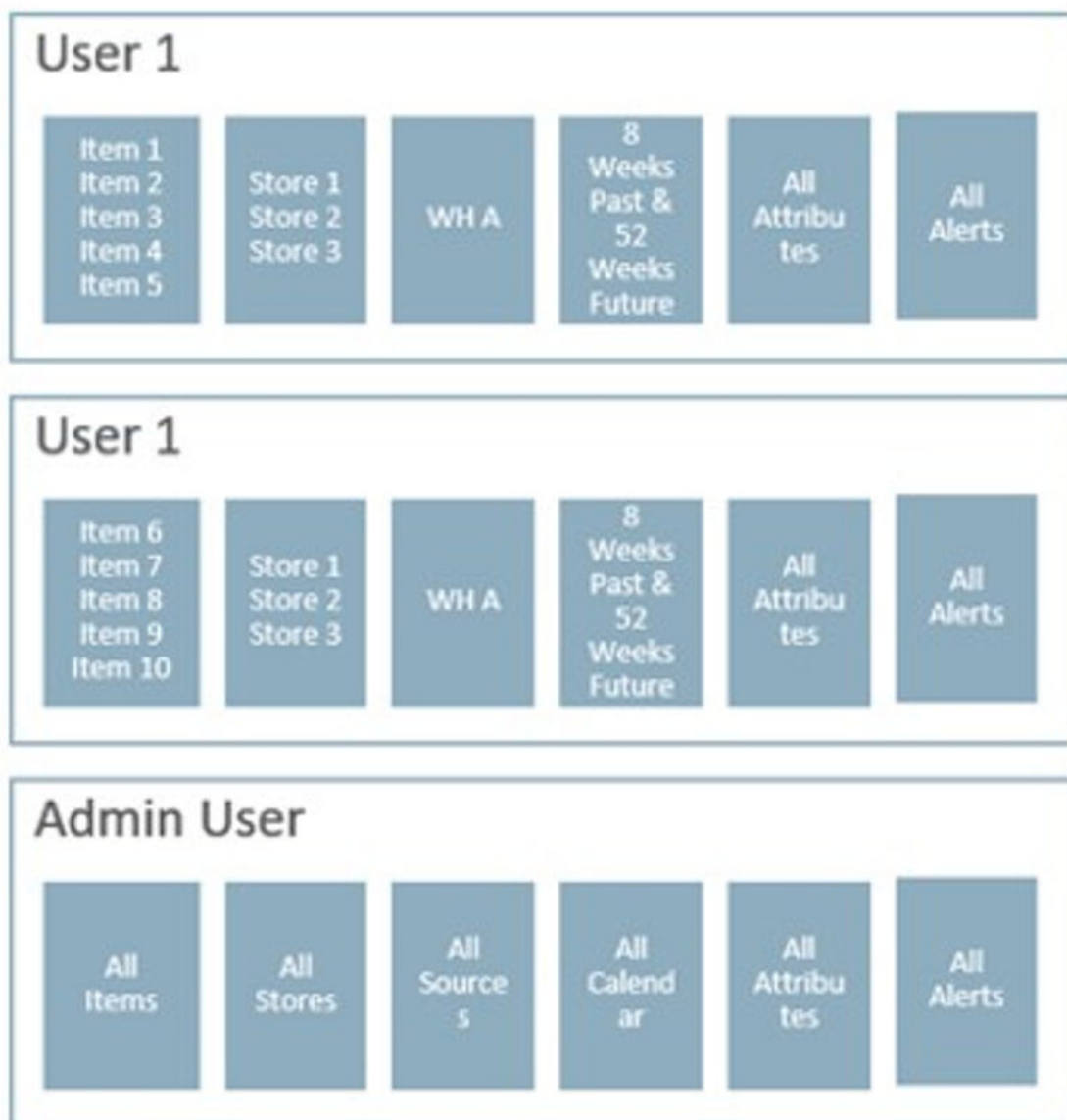
This chapter describes the Databag concept and the functionality that allow users to create and update Databags.

### **Databag Concept**

A Databag is a collection of Product, Location, Source Location, Attributes, and Alert positions that are used to facilitate the selection process when using the Replenishment Admin workspaces. The databag is the scope of a user's work. When working in the replenishment workspace, you only need to select the databag that you want to work with and the wizard process loads automatically all products, locations, attributes, and alerts linked to the selected databag. This way you do not need to go through the selection process every time. You only need to create a new Replenishment Admin workspace.

The following image illustrates different databags with different scopes and users. Each databag has its own scope with the assigned products, locations, calendar, attributes, and alerts.

Figure 15-1 Different Databags with Different Scopes and Users



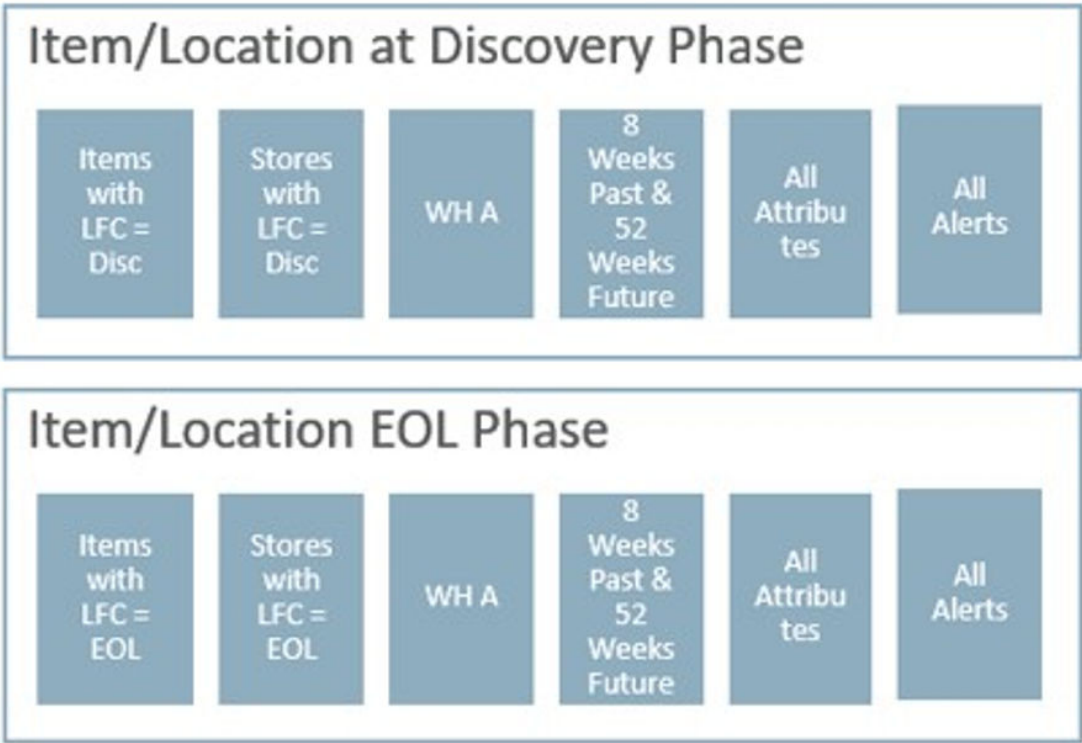
Additionally, a databag scope can also be defined using attribute-based values to identify what positions should be part of the databag scope. The following images illustrate two databags scope by attribute conditions.

Figure 15-2 Databag Containing Only Alerted Products and Locations



Databag scope based on the Lifecycle value.

Figure 15-3 Databag Scope Based on the Lifecycle Value



## Manage Databags Workspace, Steps, and Views

The following table lists the workspaces, steps, and views of the Manage Databag task.

**Table 15-1 Manage Databags Workspace, Steps, and Views**

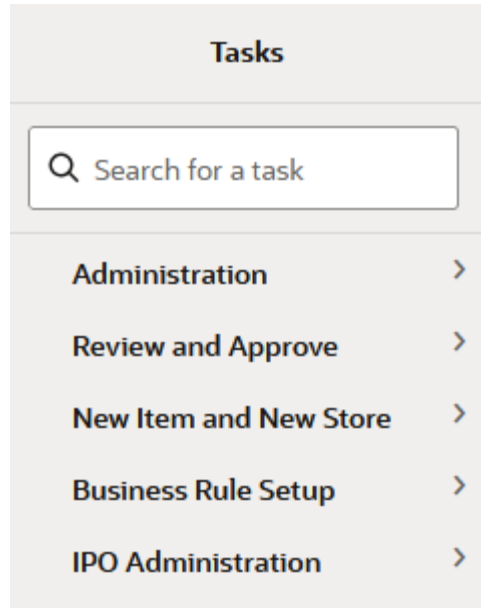
Workspace	Steps	Tab	Views
Databag Scope Workspace	Setup	Setup	Setup View
		Product Group Scope	Product Group ScopeView
		Location Group Scope	Location Group Scope View
		Source Group Scope	Source Group Scope View
		Alert Scope	Alert Scope View
		Attributes Scope	Attributes Scope View
Databag Review Workspace	Enable & Publish	Enable & Setup	Enable & Setup View
		Filter Conditions	Filter Conditions View
		Today & Parameters	Today & Parameters View
	Review Databag Details	Products	Associated PROD View
		Locations	Associated LOC View
		Sources	Associated SLOC View
		Weeks	Associated WEEK View
		Alerts	Associated Alerts View
		Attributes	Associated Attributes View
		Product- Locations	Associated PROD- LOC View
	Review Attributes & Alerts	Product	PROD Attributes View
		Location	LOC Attributes
		Product- Location	PROD-LOC Attributes
		Alerts	PROD-LOC Alerts

## Databag Scope and Review Workspaces

To build the Databag Scope or Databag Review workspaces, perform these steps:

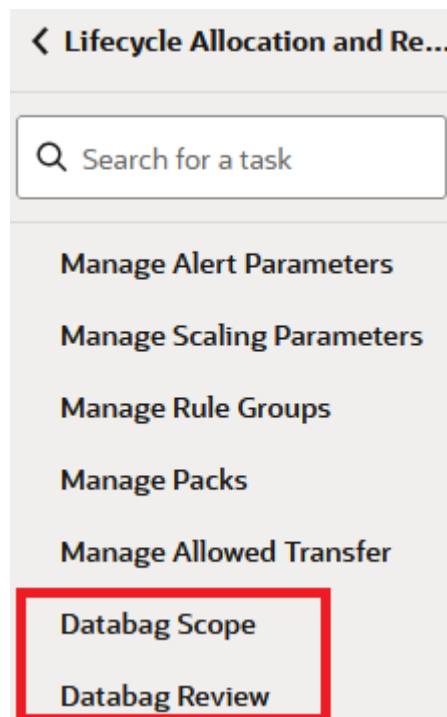
1. From the left sidebar menu, click the **Task Module** to view the available tasks.

Figure 15-4 Task Module



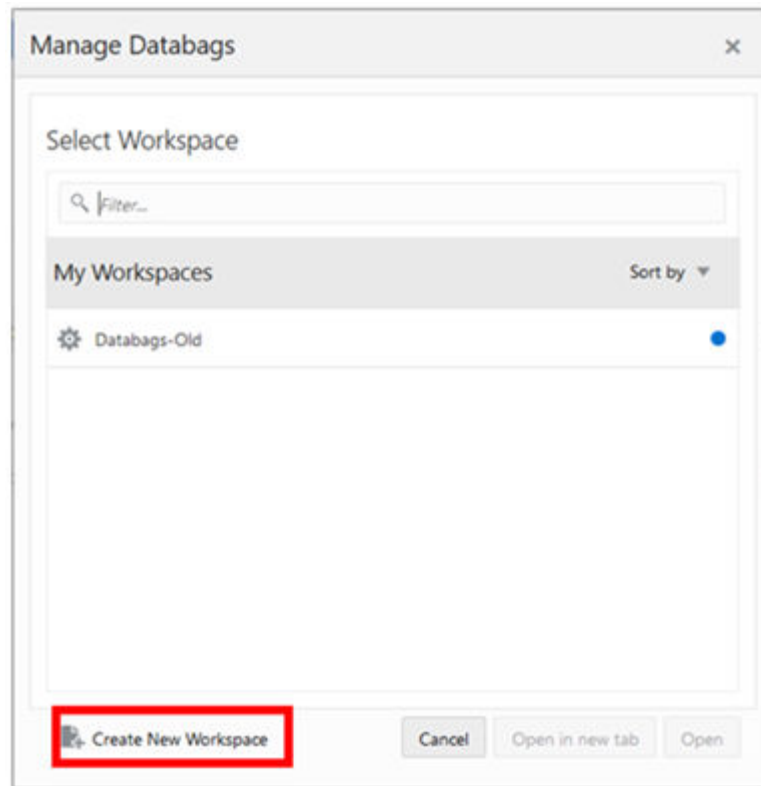
2. Click the **IPO Administration** activity and then click **Lifecycle Allocation and Replenishment** to access the available workspaces.
3. Click either **Databag Scope** or **Databag Review**. The **Databags** wizard opens.

Figure 15-5 Databags Wizard



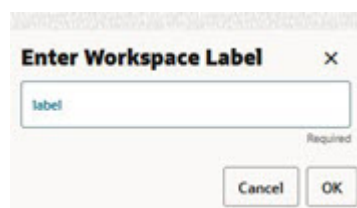
4. You can open an existing workspace, but to create a new workspace, click **Create New Workspace**.

**Figure 15-6 Create New Workspace**



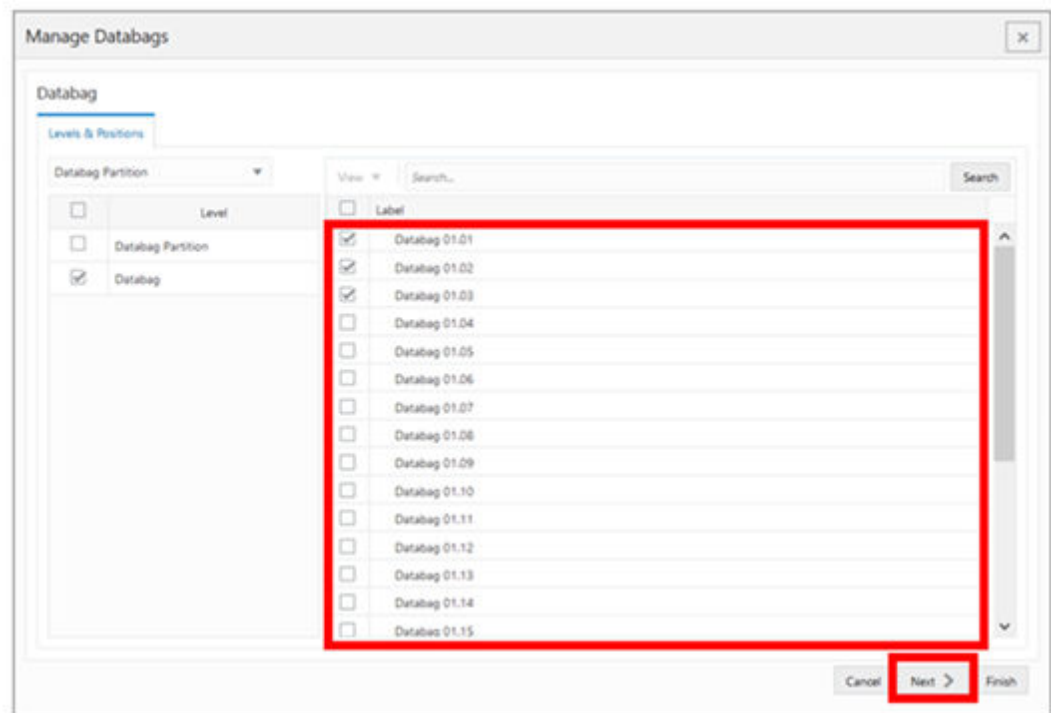
5. Enter a name for your new workspace in the label text box and click **OK**.

**Figure 15-7 Enter Workspace Label**



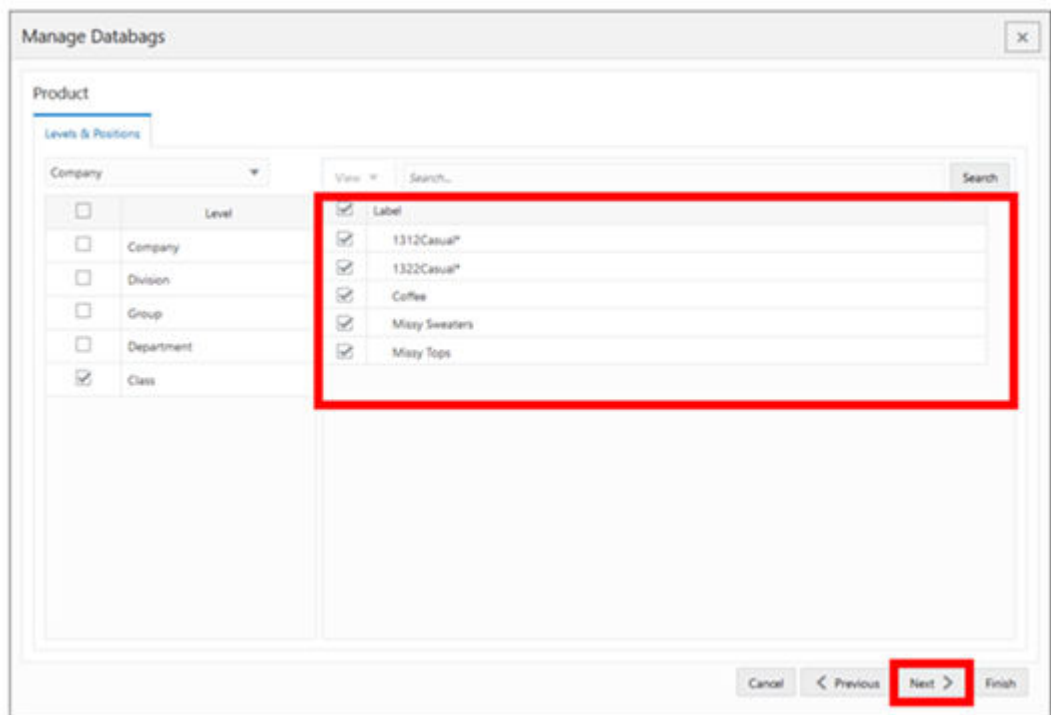
6. The Workspace wizard opens. Select the databags you want to work with and click **Next**.

Figure 15-8 Workspace Wizard: Select Databags



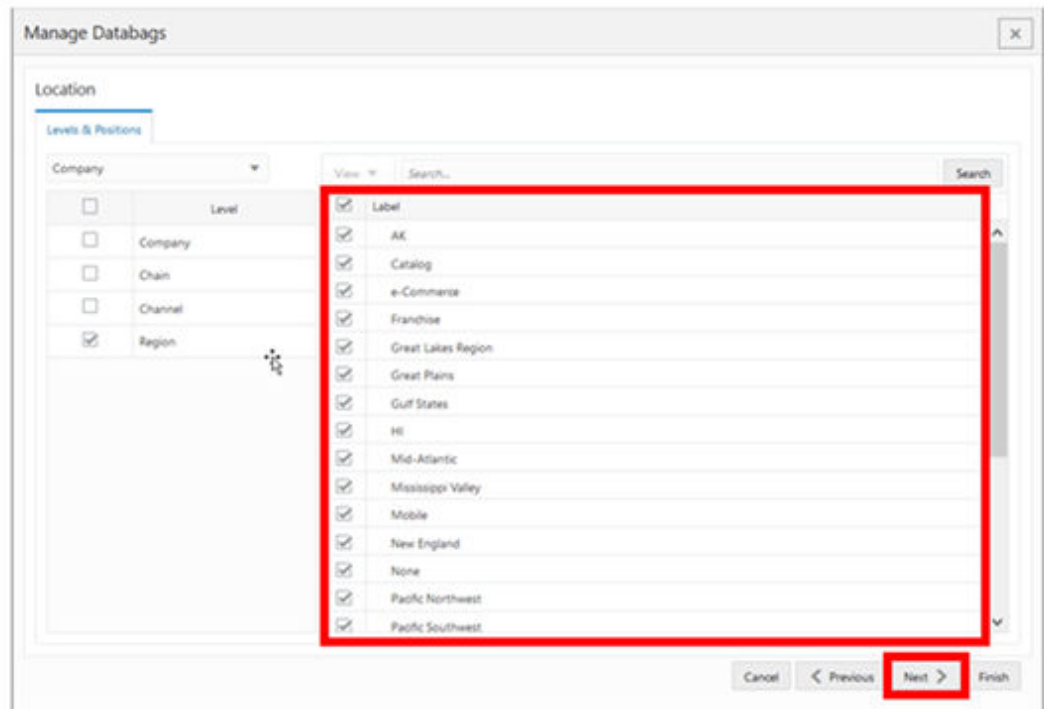
7. Select the products you want to work with and click **Next**.

Figure 15-9 Workspace Wizard: Select Product



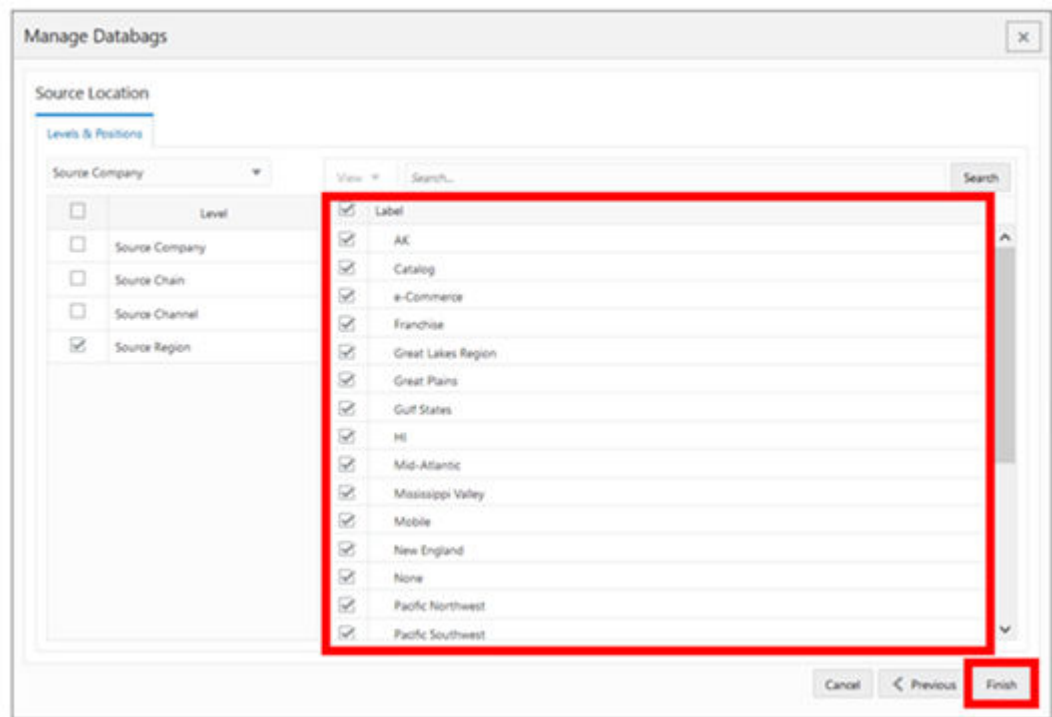
8. Select the locations you want to work with and click **Next**.

Figure 15-10 Workspace Wizard: Select Location



9. Select the source locations you want to work with and click **Finish**.

Figure 15-11 Workspace Wizard: Select Source Location



10. The wizard notifies you that your workspace is being prepared. Successful workspaces are available from the Dashboard.



**Figure 15-12 Successful Workspace Build: Manage Databags**

Application	Description	Status	Task Type	Submitted by	Started/Scheduled	Completed		<b>Databag Review</b>
Inventory Planning Opti...	Health-Check: Gather Sc...	Schedul...	hc-stats-task		10/29/23, 1...			<b>Initial</b> Last Edited 3/31/2019 Created 9/19/2023
Inventory Planning Opti...	Health-Check: Purge Old ...	Schedul...	hc-purgelogs-task		10/28/23, 1...			<b>Attr Review</b>
Inventory Planning Opti...	Health-Check: Remove O...	Schedul...	hc-orphaned-wbs		10/28/23, 9:...			<b>Initial</b> Last Edited 3/31/2019
Inventory Planning Opti...	Manage Databags	Success	WbBatch Build	oci.admin	10/25/23, 1...	10/25/23, 1...		

## Setup Step

This step contains these views:

- [Setup View](#)
- [Product Group Scope View](#)
- [Location Group Scope View](#)
- [Source Group Scope View](#)
- [Alerts Scope View](#)
- [Attributes Scope View](#)

## Setup View

The **Setup View**, under the **Setup tab**, allows you to set a meaningful label to the databag that can be used as dimension attribute in the databag hierarchy.

**Figure 15-13 Setup View**

Databag Manual Filter	Databag Type	Databag Level	Databag User Descr.	Databag Mask	Databag Valid	Matching PROD-LOC Cond.	PROD Scope Count	PROD Assoc. Count	PROD Assoc. %	LOC Sc
<input type="checkbox"/>	Replenishment	Local	Replenishment Full	All	<input checked="" type="checkbox"/>	All	538	538	100.0 %	
<input type="checkbox"/>	Replenishment	Local	Footwear	All	<input checked="" type="checkbox"/>	(LTY != Supplier)	77	77	100.0 %	
<input type="checkbox"/>	Replenishment	Local	Footwear	All	<input checked="" type="checkbox"/>	All	77	77	100.0 %	

### Setup View - Default Profile Measures

The Setup view contains the following measures.

**Databag User Descr.**

Databag User Description is an editable measure used to modify the description of a databag. This databag description can be set as a Visible Attribute for the databag hierarchy in any other workspace.

## Product Group Scope View

The **Product Group Scope View**, under the **Product Scope tab**, allows you to select specific products to include in the scope of the databag if the databag level defined in the **Enable & Setup view** is either Local or All Prod.

**Figure 15-14 Product Group Scope View**

Product Group Scope				
▼	Databag	Measure (Default)	PROD Group Scope	
Product	Databag	Databag 01.01	Databag 01.02	Databag 01.03
1312Casual*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1322Casual*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Coffee	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Coffee Maker	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Missy Sweaters	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Missy Tops	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

### Product Group Scope View - Default Profile Measures

The Product Group Scope view contains the following measure.

#### PROD Group Scope

Product Group Scope is a checkbox measure used to select which products should be assigned to the databag.

## Location Group Scope View

The **Location Group Scope View**, under the **Location Group Scope tab**, allows you to select specific locations to include in the scope of the databag if the databag level is defined in the **Enable & Setup view** as either **Local** or **All Loc**.

Figure 15-15 Location Group Scope View

Location Group Scope				
▼		Databag		Measure (Default) ▼
		Location		< LOC Group Scope  >
	Databag	Databag 01.01 ⇅	Databag 01.02 ⇅	Databag 01.03 ⇅
Location				
AK		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Catalog		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CA Virtual WH - Canada B&M		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CN Virtual WH - Guangzhou		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

### Location Group Scope View - Default Profile Measures

The Location Group Scope view contains the following measure.

#### LOC Group Scope

Location Group Scope is a checkbox measure used to select which locations should be assigned to the databag.

## Source Group Scope View

The **Source Group Scope View**, under the **Source Group Scope tab**, allows you to select specific source locations, at the location group level, to be included in the scope of the databag.

Figure 15-16 Source Group Scope View

Source Group Scope				
▼		Databag		Measure (Default) ▼
		Source Location		< SLOC Group Scope  >
	Databag	Databag 01.01 ⇅	Databag 01.02 ⇅	Databag 01.03 ⇅
Source Location				
▼ Retailer Ltd		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Supplier		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
US		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
US Virtual WH - East Coast DC B&M		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
US Virtual WH - East Coast DC B2B		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
US Virtual WH - East Coast DC Direct		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

### Source Group Scope View - Default Profile Measures

The Source Group Scope view contains the following measure.

#### SLOC Group Scope

Source Location Group Scope is a checkbox measure used to select which source locations should be assigned to the databag.

## Alerts Scope View

The **Alerts Scope View**, under the **Alerts Scope** tab, allows you to select specific alerts to be included in the scope of the databag.

**Figure 15-17 Alerts Scope View**

Alerts Scope		
Databag	Alert	Measure (Default)
Databag 01.01		
Databag 01.02		
	Alert	
	Future Promotions	View
	Maturity to EOL	View
	Max Display	-
	Max Stockroom	View
	Min Display	Filter
	New SKU	
	No Replenishment	Filter
	No Replenishment Method	Filter

### Alerts Scope View - Default Profile Measures

The Alerts Scope view contains the following measure.

#### Alert Scope

This measure allows you to select the alerts to be included in the databag scope and for which purpose they are used.

The valid values are:

- This empty value indicates that the alert should not be included in the databag.

- **View**

This value indicates that the alert should be included in the databag. The alert is then available in the Replenishment workspaces to aid in analysis and navigation. .

- **Filter**

This value indicates that the alert should be included in the databag scope and the alert is then available in the Replenishment workspace. Additionally, when the Filter values are selected, the scope of the databag is recalculated based on the product and alerts that match the alert.

 **Note:**

For example, if the alert **New SKU** is included in the databag scope and set as a Filter value, the databag is recalculated and only the products associated with the **New SKU** alert, within the defined product scope, are included in the databag. The remaining items are filtered out.

## Attributes Scope View

The **Attributes Scope View**, under the **Attributes Scope tab**, allows you to select all or any specific product, location, or product-location attributes to be included in the scope of the databag.

Figure 15-18 Attributes Scope View

Attributes Scope			
▼	Databag	Measure (Default) ▼	
	Business Rule Attribute	ATTR Scope	
		Databag	Databag 01.01
			Databag 01.02
Business Rule Attribute			
▼	all [Business Rule Attribute]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Assortment End Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Assortment Start Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Brand	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Brand Tier	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Class	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Collar	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Color	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Department	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	HighPriority Item 01	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Historic Average Sales 01	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Historic Sales Coefficient Of Variation 01	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Item Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Life Cycle Phase	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

### Attributes Scope View - Default Profile Measures

The Attributes Scope view contains the following measure.

#### ATTR Scope

Attribute Scope allows you to select which attributes should be included in the databag scope.

**Note:**

By default, if none of the attributes are selected for the databag then the calculation assumes that all attributes are available for the databag. If you select at least one attribute, then only the selected attributes are available for the databag.

## Enable & Publish Step

This step contains these views:

- [Enable & Setup View](#)
- [Filter Conditions View](#)
- [Today & Parameters View](#)

## Enable & Setup View: Databag Review

The **Enable & Setup View**, under the **Enable & Setup** tab, allows you to select specific alerts to view databag statistics and enable or disable the databag. You can also set a meaningful label to the databag that can be used as a dimension attribute in the databag hierarchy.

**Figure 15-19 Enable & Setup View: Databag Review**

Databag Manual Filter	Databag Type	Databag Level	Databag User Descr	Databag Mask	Databag Valid	Matching PROD-LOC Cond.	PROD Scope Count	PROD Assoc Count	PROD Assoc. %	LOC Sc
<input type="checkbox"/>	Replenishment	Local	Replenishment Full	All	<input checked="" type="checkbox"/>	All	538	538	100.0 %	
<input type="checkbox"/>	Replenishment	Local	Footwear	All	<input checked="" type="checkbox"/>	(LTY != Supplier)	77	77	100.0 %	
<input type="checkbox"/>	Replenishment	Local	Footwear	All	<input checked="" type="checkbox"/>	All	77	77	100.0 %	

### Enable & Setup View: Databag Review - Default Profile Measures

The Enable & Setup view contains the following measures.

#### Databag Manual Filter

This is a checkbox measure that you can select or clear to filter all views of the workspace by the databags that are selected as manual filters. When selected, only the selected databags are available. In order to see all databags, no databag should be selected (This is the default behavior).

#### Databag Type

This measure allows you to enable or disable the databag. The valid values for this measure are:

- **Replenishment:** The databag is used to open a Replenishment workspaces.
- **Off:** The databag is unavailable.

#### Databag Level

This measure allows you to choose the level of PROD-LOC at which the databag is defined. The valid values for this measure are:

- **Local:** The Product and Location scope of this databag is based on the set up of the scope defined in the Product Group Scope and Location Group Scope views.
- **All Prod:** The Product scope of this databag is all Products and it ignores the set up of the scope defined in the Product Group Scope view. While the Location is based on the set up of the scope defined in the Location Group Scope view.
- **All Loc:** The Product scope of this databag is based on the set up of the scope defined in the Product Group Scope view. While the Location scope is all Location, it ignores the set up of the scope defined in the Location Group Scope view.
- **Global:** The Product and Location scope is based on all Products and all Locations and it ignores the set up of the scopes defined in the Product Group Scope and Location Group Scope views.

#### **Databag User Descr.**

Databag User Description is an editable measure used to modify the description of a databag. This databag description can be set as a Visible Attribute for databag hierarchy in any other workspace.

#### **Databag Mask**

This measure allows you to select additional filters for the Product and Location scope. The valid values for this measure are:

- **All:** The Product and Location scope is based on the scope defined by you in the Product Group Scope and Location Group Scope views. No additional filtering is applied.
- **Ass. Valid:** The Product and Location scopes defined by you in the Product Group Scope and Location Group Scope views are filtered out if the product and location combination is not assorted. This way, only valid assortment combinations is part of the databag.
- **Lfc. Valid:** The Product and Location scopes defined by you in the Product Group Scope and Location Group Scope views are filtered out if the product and location combination does not have a valid lifecycle. For example, typically, warehouses are not assorted. Therefore they are excluded by the Assorted Valid mask. However, as warehouses source assorted products for one or more stores, then they have a valid lifecycle for the products.

#### **Matching PROD-LOC Cond**

Matching Product-Location Condition is a calculated measure that indicates the filter condition defined in the Filter Conditions view. If there is no condition defined, it displays All. Otherwise, it displays the string with the conditions defined in the Filter Conditions view.

#### **PROD Scope Count**

Product Scope Count is a calculated measure that indicates the number of products based on the product groups selected in the Product Group Scope view and the databag mask value.

#### **PROD Assoc. Count**

Product Association Count is a calculated measure that indicates the number of products based on the product groups selected in the Product Group Scope view with the filter conditions applied and the databag mask value.

#### **PROD Assoc. %**

Product Association Percentage is a calculated measure that indicates the percentage of products that are being considered for the databag. It is calculated as:



**Figure 15-20 Calculation**

$$100 \frac{PRODAssoc.Count}{PRODScopeCount}$$

**LOC Scope Count**

Location Scope Count is a calculated measure that indicates the number of locations based on the location groups selected in the Location Group Scope view and the databag mask value.

**LOC Assoc. Count**

Location Association Count is a calculated measure that indicates the number of locations based on the location groups selected in the Location Group Scope view with the filter conditions applied and the databag mask value.

**LOC Assoc. %**

Location Association Percentage is a calculated measure that indicates the percentage of locations that are being considered for the databag. It is calculated as:

**Figure 15-21 Calculation**

$$100 \frac{LOCAssoc.Count}{LOCScopeCount}$$

**SLOC Assoc. Count**

Source Location Association Count is a calculated measure that indicates the number of source locations based on the location groups selected in the Source Location Group Scope view with the filter conditions applied and the databag mask value.

**Past Dur Weeks (weeks)**

Past Duration Weeks is an editable measure used to input the number of weeks in the past that should be included in the databag scope.

**Future Dur Weeks (weeks)**

Future Duration Weeks is an editable measure used to input the number of weeks in the future that should be included in the databag scope.

**WEEK Assoc. Count**

WEEK Association Count is a calculated measure that indicates the number of weeks included in the databag scope.

**Alerts Assoc. Count**

Alerts Association Count is a calculated measure that indicates the number of alerts included in the databag scope.

**ATTR Assoc. Count**

ATTRIBUTE Association Count is a calculated measure that indicates the number of attributes (product, location or/and product-location attributes) included in the databag scope.

### Last Databag Publish User ID

This is a calculated measure that audits the databag **Publish Data** button. It is populated with the user ID that last ran the **Publish Data** button.

### Last Databag Publish Date

This is a calculated measure that audits the **Publish Data** button. It is populated with the date and time that last ran the **Publish Data** button.

## Filter Conditions View

This view allows you to define the conditions for the rules based in product, location, and product-location attributes. A rule condition is what allows the engine to find the product and location combinations where the rule is applicable.

**Figure 15-22 Filter Conditions View**

Measure	Cond Attribute	Within Cond Op	Cond Value	Cond Value String	Cond Value Measure	Cond Value Date	Between Cond Op	Cond Order	Cond Group	Validation Result	Invalid Flag	Valid Flag	
Rule Condition	Department	==	-	0.00 Missy	-	-	AND	-	1	1	(dept == missy and	<input type="checkbox"/>	<input checked="" type="checkbox"/>
condition 01	Class	!=	-	0.00 Missy Sweaters	-	-	-	-	2	1	cls != missy_sweaters)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
condition 02	-	-	-	0.00	-	-	-	-	3	1	-	<input type="checkbox"/>	<input type="checkbox"/>
condition 03	-	-	-	0.00	-	-	-	-	4	1	-	<input type="checkbox"/>	<input type="checkbox"/>
condition 04	-	-	-	0.00	-	-	-	-	-	-	-	<input type="checkbox"/>	<input type="checkbox"/>

### Filter Conditions View - Default Profile Measures

The Filter Conditions view contains the following measures.

#### Condition Attribute

The Condition Attribute measure allows you to select the attribute for the condition, The attributes for the rules are assigned in the Attribute Review workspace.

#### Within Cond Op

The Within Cond Op measure allows you to specify the operator to be used inside the condition.

**Table 15-2 Within Cond Op Measure Available Operators**

Possible Operators	Descriptions	Example
==	Checks if the attribute value is equal with the Condition Value	brand == Private Label
!=	Checks if the attribute value is different from the Condition Value	average sales != 0
>	Checks if the attribute value is larger than the Condition Value	Average sales >5
>=	Checks if the attribute value is larger or equal to the Condition Value	

**Table 15-2 (Cont.) Within Cond Op Measure Available Operators**

Possible Operators	Descriptions	Example
<	Checks if the attribute value is less than the Condition Value	Standard deviation of sales <6
<=	Checks if the attribute value is less or equal to the Condition Value	
contain		
not contain		
match		
not match		

**Cond Value**

The Cond Value measure is used when the type of the attribute is numeric. Example: average sales > 10

**Cond Value String**

The Cond Value String measure is used when the type of the attribute is a string. Example: brand == Private Label

**Cond Value Measure**

The value of the Cond Value measure is a measure name, which is populated by an expression that let's you refine the condition value. For instance private label versus non-private label.

This measure is used when you want to refine the condition value.

For instance, for the coffee items, except Private Label, you want to assign items to the rule that sell more than 50 per week. For Private Label items you may want the value to be 100. You need to populate your Condition measure with a value of 100 for all Private Label items, and the rest of the coffee items with 50.

**Cond Value Date**

The Cond Value Date measure is used when the type of the attribute is a date. Example: today >= 02/30/2024"

**Between Cond Op**

Within a rule there can be multiple conditions and also multiple condition groups. This is specified in the Cond Group measure. Conditions with the same Cond Group value belong to the same group.

For example, if a rule has four conditions, Conditions 1 and 2 can belong to Condition group 1, and Conditions 3 and 4 can belong to the Condition group 2. Also, the Cond Order measure gives the ranking of the conditions inside the group.

The following table is an assumed use case:

**Table 15-3 Between Cond Op Assumed Use Case**

Condition	Between Con Op	Cond Order	Cond Group
Condition 1	AND	1	1
Condition 2	OR	2	1
Condition 3	OR	3	2
Condition 4		4	2

The value for the Between Cond Op can be the logical operators AND or OR.

The conditions are evaluated first inside a condition group and then between groups. In the previous case, the resulting condition is:

(Condition 1 **AND** Condition 2) **OR** (Condition 3 **OR** Condition 4)

Here is an example where all conditions belong to the same condition group:

**Table 15-4 Example: All Conditions Belong to the Same Condition Group**

Condition	Between Con Op	Cond Order	Cond Group
Condition 1	AND	1	1
Condition 2	OR	2	1
Condition 3	OR	3	1
Condition 4		4	1

The resulting condition for the rule is given by:

Condition 1 **AND** Condition 2 **OR** Condition 3 **OR** Condition 4

Note that the conditions are evaluated in the order given by the values in the Cond Order measure.

### Cond Order

The Cond Order measure displays the order in which conditions are evaluated, wither independently or inside a condition group.

### Cond Group

The Cond Group measure allows you to group conditions. This is useful when you want to evaluate conditions in a two-step process. First, the conditions are evaluated inside groups. In the second step, the group results are evaluated .

### Validation Result

The Validation Result measure displays the condition expressions that are validated.

### Invalid Flag

The Invalid Flag measure indicates if a condition is invalid.

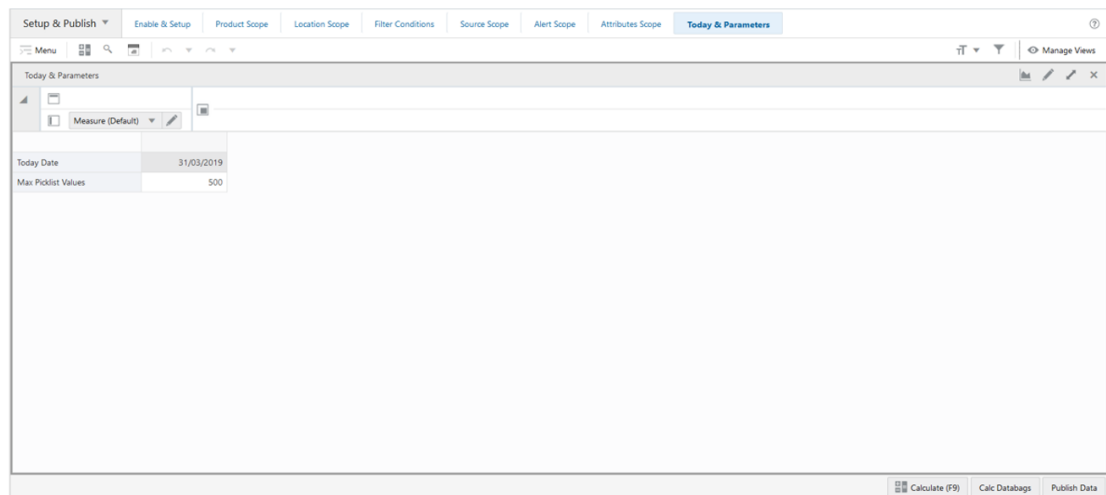
### Valid Flag

The Valid Flag measure indicates if a condition is valid.

## Today & Parameters View

The **Today & Parameters View**, under the **Today & Parameters tab**, allows you to review the system date and to maintain the maximum number of positions that can be loaded into the condition value measures in the Filter Condition view.

**Figure 15-23 Today & Parameters View**



### Today & Parameters View - Default Profile Measures

The Today & Parameters view contains the following measure.

#### Max Picklist Values

Maximum Picklist Values allows you to set the maximum number of values that can be loaded into the condition values measure (picklist measures) in the Filter Condition view. The default value is 500.

## Review Databags Details Step

This step provides you with all the databag details as a result of the databag set up from the Enable & Publish step. This step contains these views:

- [Associated PROD View](#)
- [Associated LOC View](#)
- [Associated SLOC View](#)
- [Associated WEEK View](#)
- [Associated Alerts View](#)
- [Associated Attributes View](#)
- [Associated PROD-LOC View](#)

## Associated PROD View

The **Associated PROD View**, under the **Products tab**, allows you to review the products that are in scope and associated with the databag based on the databag set up.

**Figure 15-24 Associated PROD View**

Product	PROD Scope	PROD Assoc.
2000004 - "Independence Day"	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2000005 - "Independence Day"	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2000006 - "Independence Day"	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10000013 - Women's Canvas	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10000014 - Women's Canvas	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10000015 - Women's Canvas	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10000046 - Basketball Training	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10000047 - Basketball Training	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10000048 - Basketball Training	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10000061 - Men's Winter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10000062 - Men's Winter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10000063 - Men's Winter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10000076 - "Newspaper" Men's	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10000077 - "Newspaper" Men's	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10000078 - "Newspaper" Men's	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

### Associated PROD View - Default Profile Measures

The Associated PROD view contains the following measures.

#### PROD Scope

Product Scope indicates if a product is in the databag scope. When selected, the product is in the databag scope. This indicates that the product met the filter conditions defined in the previous step. When clear, the product is not in the databag scope.

#### PROD Assoc.

Product Associated indicates if a product is associated with the databag. When selected, the product is associated with the databag. This indicates that the product was evaluated within the databag but does not meet the conditions of the filter evaluation. When clear, the product is not associated with the databag.

## Associated LOC View

The **Associated LOC View**, under the **Locations tab**, allows you to review the locations that are in scope and associated with the databag based on the databag set up.

Figure 15-25 Associated LOC View

Location	LOC Scope	LOC Assoc.
1000 Web	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1002 Dallas	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1005 Philadelphia Outlet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1006 Chicago	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1007 Minneapolis	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1046 Minot	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1047 Grand Forks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1048 Bismark	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1049 Fargo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1050 Rapid City	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1051 Sioux Falls	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1052 Aberdeen	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1053 Scottbluff	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1054 Duluth	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1055 Mankato	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1056 St. Paul	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

### Associated LOC View - Default Profile Measures

The Associated LOC view contains the following measures.

#### LOC Scope

Location Scope indicates if a location is in the databag scope. This indicates that the location met the filter conditions defined in the previous step. When selected, the location is in the databag scope. When clear, the location is not in the databag scope.

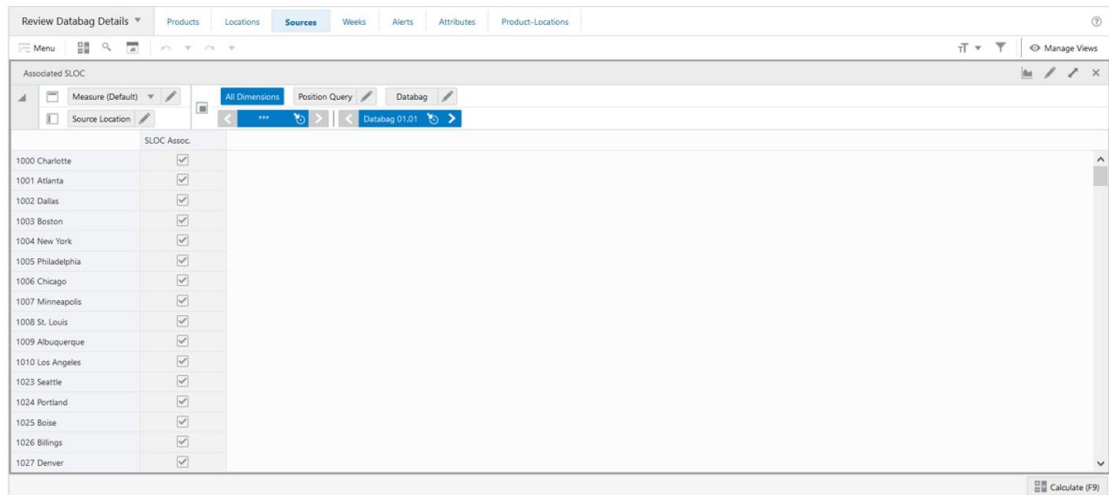
#### LOC Assoc.

Location Associated indicates if a location is associated with the databag. When selected, the location is associated with the databag. This indicates that the location was evaluated within the databag but does not meet the conditions of the filter evaluation. When clear, the location is not associated with the databag.

## Associated SLOC View

The **Associated SLOC View**, under the **Sources tab**, allows you to review the source locations that are in scope and associated with the databag based on the databag set up.

**Figure 15-26 Associated SLOC View**



**Associated SLOC View - Default Profile Measures**

The Associated SLOC view contains the following measure.

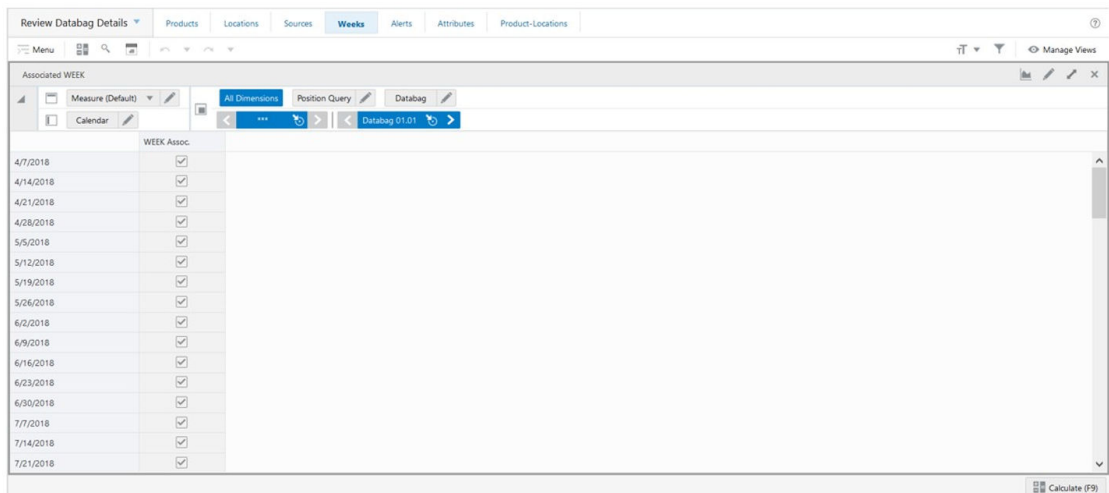
**SLOC Assoc.**

Source Location Associated indicates if a source location is associated with the databag. When selected, the source location is associated with the databag. This indicates that the source location was evaluated within the databag but does not meet the conditions of the filter evaluation. When clear, the source location is not associated with the databag.

**Associated WEEK View**

The **Associated WEEK View**, under the **Weeks** tab, allows you to review the weeks that are associated with the databag based on the past and the future number of weeks entered in the databag set up.

**Figure 15-27 Associated WEEK View**





### Associated WEEK View - Default Profile Measures

The Associated WEEK view contains the following measure.

#### WEEK Assoc.

WEEK Associated indicates if a week is associated with the databag. When selected, the week is associated with the databag. When clear, the week is not associated with the databag.

## Associated Alerts View

The **Associated WEEK View**, under the **Alerts tab**, allows you to review the alerts that are associated with the databag based on the databag alert scope.

**Figure 15-28 Associated Alerts View**

	Databag 01.01	Databag 01.02	Databag 01.03
D01 Recent Item Launch	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
E01 EOL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
E02 Out of Size Codes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
E03 Poor Performance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
E04 Maturity to EOL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
G01 Replenishment Watch List	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
G02 Max Stockroom	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
G03 Min Display	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
G04 Max Display	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
G05 Shortage (Current)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
G06 Overstock (Current)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
G07 No Replenishment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
G08 No Replenishment Method	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ID1 Init Alloc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
M01 Maturity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
M02 Future Promotions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

### Associated Alerts View - Default Profile Measures

The Associated Alerts view contains the following measure.

#### Alerts Assoc.

Alerts Associated indicates if an alert is associated with the databag. When selected, the alert is associated with the databag. When clear, the alert is not associated with the databag.

## Associated Attributes View

The **Associated Attributes View**, under the **Attributes tab**, allows you to review the attributes associated with the databag based on the databag attributes scope.

Figure 15-29 Associated Attributes View

Attribute	Databag 01.01	Databag 01.02	Databag 01.03
Chain	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Channel	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Class	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Department	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
District	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Division	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Grandparent	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Item	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Item Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Item Performance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Lead Time	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Lifecycle	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Loc Attr 03	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Associated Attributes View - Default Profile Measures**

The Associated Attributes view contains the following measure.

**ATTR Assoc.**

Attribute Associated indicates if an attribute is associated with the databag. When selected, the attribute is associated with the databag. When clear, the attribute is not associated with the databag.

Associated PROD-LOC View

The **Associated PROD-LOC View**, under the **Product-Locations** tab, allows you to review product-location combinations that are associated with the databag based on the databag set up.

Figure 15-30 Associated PROD-LOC View

Product	1000 Web	1002 Dallas	1005 Philadelphia	1006 Chicago	1007 Minneapolis	1046 Minot	1047 Grand Forks	1048 Bismark	1049 Fargo	1050 Rapid City	1051 Sioux Falls	1052
2000004 - "Independence Day"	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2000005 - "Independence Day"	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2000006 - "Independence Day"	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10000013 - Women's Canvas	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10000014 - Women's Canvas	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10000015 - Women's Canvas	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10000046 - Basketball Training	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10000047 - Basketball Training	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10000048 - Basketball Training	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10000061 - Men's Winter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10000062 - Men's Winter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10000063 - Men's Winter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10000076 - "Newspaper" Men's	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10000077 - "Newspaper" Men's	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10000078 - "Newspaper" Men's	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

### Associated PROD-LOC View - Default Profile Measures

The Associated PROD-LOC view contains the following measure.

#### PROD-LOC Assoc.

Product-Location Associated indicates if a product-location combination is associated with the databag. When selected, the product-location combination is associated with the databag. When clear, the product-location combination is not associated with the databag.

## Review Attributes & Alerts Step

This step provides you with all the required views to review the product, location, and product-location attribute values. This step contains these views:

- [PROD Attributes View](#)
- [LOC Attributes View](#)
- [PROD-LOC Attributes View](#)
- [PROD-LOC Alerts View](#)

## PROD Attributes View

The **PROD Attributes View**, under the **Product** tab, allows you to review the product attribute values.

**Figure 15-31 PROD Attributes View**

Item	Item Group	Item Performance	Pack Type	Parent
1234582 - Folgers - Breakfast	Folgers - Breakfast			Folgers - Breakfast
1234600 - Maxwell House -	Maxwell House -			Maxwell House -
1234615 - Maxwell House -	Maxwell House -			Maxwell House -
1234747 - Folgers - 100%	Folgers - 100%			Folgers - 100%
1234753 - Folgers - Dark Roast	Folgers - Dark Roast			Folgers - Dark Roast
1234759 - Folgers - Medium	Folgers - Medium			Folgers - Medium
1234762 - Folgers - Breakfast	Folgers - Breakfast			Folgers - Breakfast
1234765 - Folgers - French	Folgers - French			Folgers - French
1234768 - PL - 100%	PL - 100%			PL - 100%
1234769 - PL - French Roast	PL - French Roast			PL - French Roast
1234770 - PL - French Roast	PL - French Roast			PL - French Roast
1234771 - PL - Breakfast Roast	PL - Breakfast Roast			PL - Breakfast Roast
1234772 - PL - Medium Roast	PL - Medium Roast			PL - Medium Roast
1234773 - PL - Dark Roast	PL - Dark Roast			PL - Dark Roast
1234774 - PL - French Roast	PL - French Roast			PL - French Roast

### PROD Attributes View - Default Profile Measures

The PROD Attributes view contains the following measure.

#### Attribute Product Value

This measure displays the product attribute values.

## LOC Attributes View

The **LOC Attributes View**, under the **Location** tab, allows you to review location attribute values.

**Figure 15-32 LOC Attributes View**

	Chain	Channel	Company	District	Lead Time	Loc Atr 03	Loc Atr 04	Loc Atr 05	Loc Atr 06	Loc Atr 07	Loc Atr 08
1000 Web	US	Brick & Mortar	Retailer Ltd	North Carolina	3						
1001 Atlanta	US	Brick & Mortar	Retailer Ltd	Georgia	5						
1002 Dallas	US	Brick & Mortar	Retailer Ltd	Texas	7						
1003 Boston	US	Brick & Mortar	Retailer Ltd	Massachusetts	10						
1004 New York	US	Brick & Mortar	Retailer Ltd	New York	14						
1005 Philadelphia Outlet	US	Brick & Mortar	Retailer Ltd	Pennsylvania	3						
1006 Chicago	US	Brick & Mortar	Retailer Ltd	Illinois	5						
1007 Minneapolis	US	Brick & Mortar	Retailer Ltd	Minnesota	7						
1008 St. Louis	US	Brick & Mortar	Retailer Ltd	Missouri	10						
1009 Albuquerque	US	Brick & Mortar	Retailer Ltd	New Mexico	14						
1010 Los Angeles	US	Brick & Mortar	Retailer Ltd	California	3						
1023 Seattle	US	Brick & Mortar	Retailer Ltd	Washington	5						
1024 Portland	US	Brick & Mortar	Retailer Ltd	Oregon	7						
1025 Boise	US	Brick & Mortar	Retailer Ltd	Idaho	10						
1026 Billings	US	Brick & Mortar	Retailer Ltd	Montana	14						

### LOC Attributes View - Default Profile Measures

The LOC Attributes view contains the following measure.

#### Attribute Location Value

This measure displays the location attribute values.

## PROD-LOC Attributes View

The **PROD-LOC Attributes View**, under the **Product-Location** tab, allows you to review product-location attribute values.

**Figure 15-33 PROD-LOC Attributes View**

Product	Location	Lifecycle	Prod-Loc Atr 01	Prod-Loc Atr 02	Prod-Loc Atr 03	Prod-Loc Atr 04	Prod-Loc Atr 05	Prod-Loc Atr 06	Prod-Loc Atr 07	Prod-Loc Atr 08
1234582 - Folgers - Breakfast Roast Non-Flavored Decaf - Ground - 12 oz Can	1000 Web	Dev								
	1001 Atlanta									
	1002 Dallas	Dev								
	1003 Boston									
	1004 New York									
	1005 Philadelphia Outlet	Dev								
	1006 Chicago	Dev								
	1007 Minneapolis	Dev								
	1008 St. Louis									
	1009 Albuquerque									
	1010 Los Angeles									
	1023 Seattle									
	1024 Portland									
1025 Boise										
1026 Billings										

**PROD-LOC Attributes View - Default Profile Measures**

The PROD-LOC Attributes view contains the following measure.

**Attribute Prod-Loc Value**

This measure displays the product-location attribute values.

**PROD-LOC Alerts View**

The **PROD-LOC Alerts View**, under the **Alerts** tab, allows you to review which alerts are assigned per product-location.

**Figure 15-34 PROD-LOC Alerts View**

Product	Location	Alert PROD-LOC
1234582 - Folgers - Breakfast Roast Non-Flavored Decaf - Ground - 12 oz Can	1000 Web	<input type="checkbox"/>
	1001 Atlanta	<input type="checkbox"/>
	1002 Dallas	<input type="checkbox"/>
	1003 Boston	<input type="checkbox"/>
	1004 New York	<input type="checkbox"/>
	1005 Philadelphia	<input type="checkbox"/>
	1006 Chicago	<input type="checkbox"/>
	1007 Minneapolis	<input type="checkbox"/>
	1008 St. Louis	<input type="checkbox"/>
	1009 Albuquerque	<input type="checkbox"/>
	1010 Los Angeles	<input type="checkbox"/>
	1023 Seattle	<input type="checkbox"/>
	1024 Portland	<input type="checkbox"/>
1025 Boise	<input type="checkbox"/>	
1026 Billings	<input type="checkbox"/>	
1234583 - Folgers - Dark Roast Non-Flavored Decaf - Ground - 12 oz Can	1000 Web	<input type="checkbox"/>
	1001 Atlanta	<input type="checkbox"/>
	1002 Dallas	<input type="checkbox"/>
	1003 Boston	<input type="checkbox"/>
	1004 New York	<input type="checkbox"/>
	1005 Philadelphia	<input type="checkbox"/>
	1006 Chicago	<input type="checkbox"/>
	1007 Minneapolis	<input type="checkbox"/>
	1008 St. Louis	<input type="checkbox"/>
	1009 Albuquerque	<input type="checkbox"/>
	1010 Los Angeles	<input type="checkbox"/>
	1023 Seattle	<input type="checkbox"/>
	1024 Portland	<input type="checkbox"/>
1025 Boise	<input type="checkbox"/>	
1026 Billings	<input type="checkbox"/>	

**PROD-LOC Alerts View - Default Profile Measures**

The PROD-LOC Alerts view contains the following measure.

This measure displays the product-location attribute values.

## Manage Databag Action Buttons

The Manage Databag workspace has the following action buttons available:

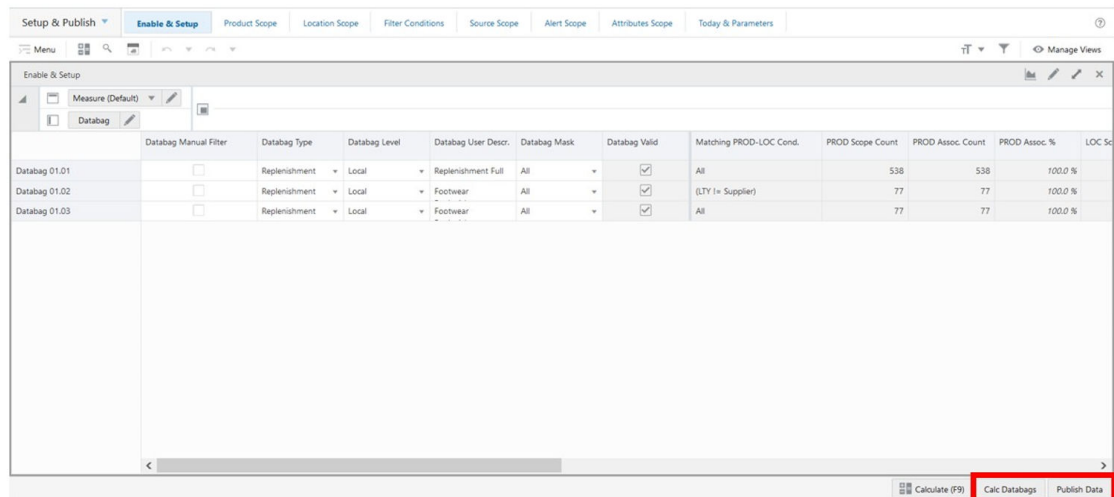
- **Calc Databags**

Use the **Calculation Databags** action button to calculate the databag scope based on all the set up you created. The result is the Boolean measure that is used by the Replenishment workspace to load the correct scope of products, locations, source locations, attributes and alerts.

- **Publish Data**

Use the **Publish Data** action button to commit the changes made in the Manage Databag workspace. It also saves the audit information of the update and commits the measures **Last Databag Publish User ID** and **Last Databag Publish Date** based on who and when the Publish Data was last run.

**Figure 15-35 Manage Databag Action Buttons**



# 16

## Manage Rule Groups

This chapter describes the rule groups concept and the functionality that allows you to create and update the rule groups.

### About Rule Groups

A Rule Group is a collection of Product, Location, Source Location and Attribute positions that are used to facilitate your selection process when setting up the supply chain network and replenishment rules. The application works with two types of Rule Groups:

- Setup Rule Group
- Parameters Rule Group

While the Setup rule group is used to set up the supply chain network model (for example, bill of distribution, planning calendar, and so on.), the Parameter rule group is used to set up the replenishment methods and replenishment parameters (for example, target stock method with a re-order level of 50%). By default, IPOCS-Lifecycle Allocation and Replenishment should be configured with at least two rule groups containing all positions. One for Setup and one for Parameters.

## Manage Rule Groups Workspace, Steps, and Views

The following table lists the workspaces, steps, and views for the Manage Rule Groups task.

**Table 16-1** Manage Rule Groups Workspace, Steps, and Views

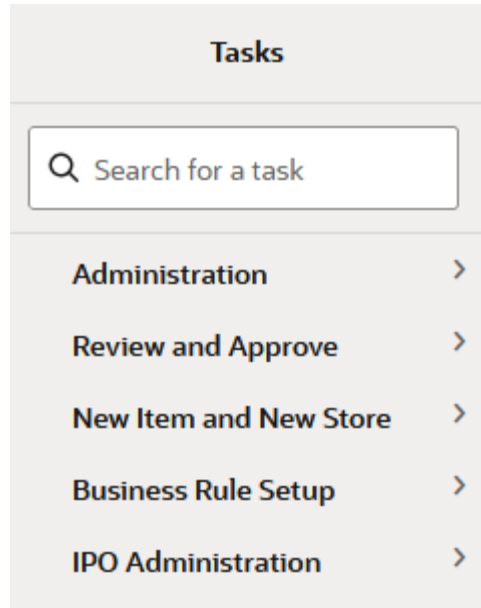
Workspace	Step	Tab	Views
Manage Rule Groups Workspace	Setup & Publish	Enable & Setup	Enable & Setup View
			Statistics View
			Today View
		Product Scope	Product Group Scope View
		Location Scope	Location Group Scope View
		Source Scope	Source Scope View
Attribute Scope	Attribute Scope View		

## Manage Rule Groups Workspace

To build the Manage Rule Groups workspace, perform these steps:

1. From the left sidebar menu, click **Task Module** to view the available tasks.

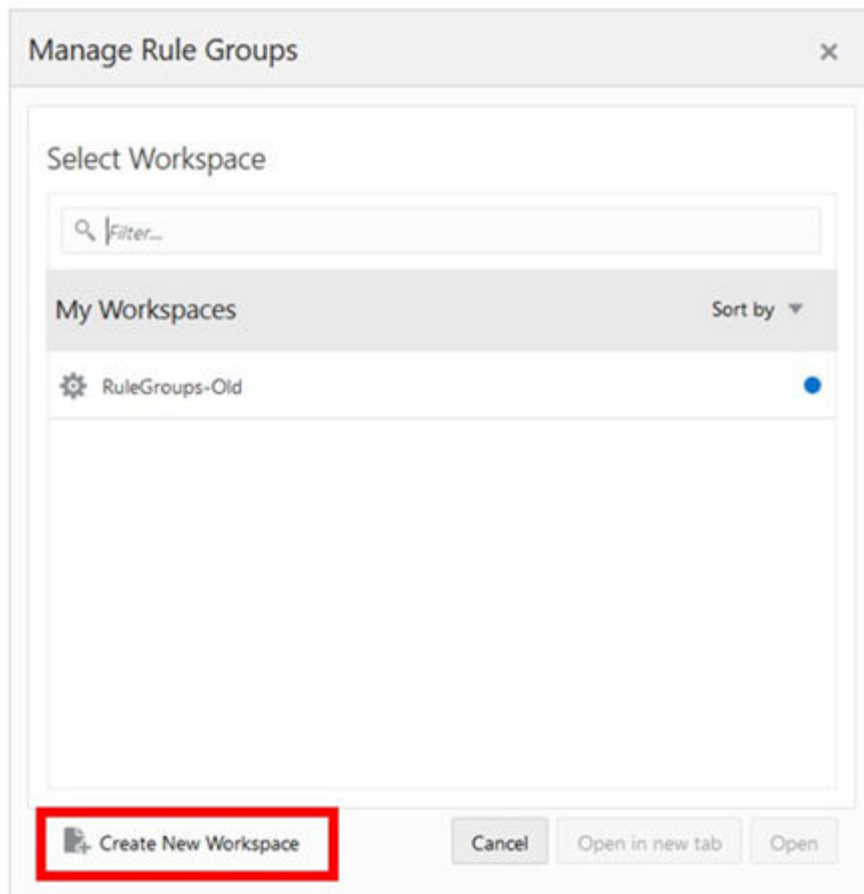
**Figure 16-1 Task Module**



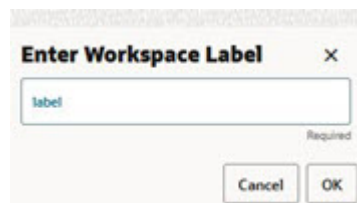
2. Click the **IPO Administration** activity and then click **Lifecycle Allocation and Replenishment** to access the available workspaces.
3. Click **Manage Rule Groups**. The **Manage Rule Groups** wizard opens.
4. You can open an existing workspace, but to create a new workspace, click **Create New Workspace**.



Figure 16-2 Create New Workspace

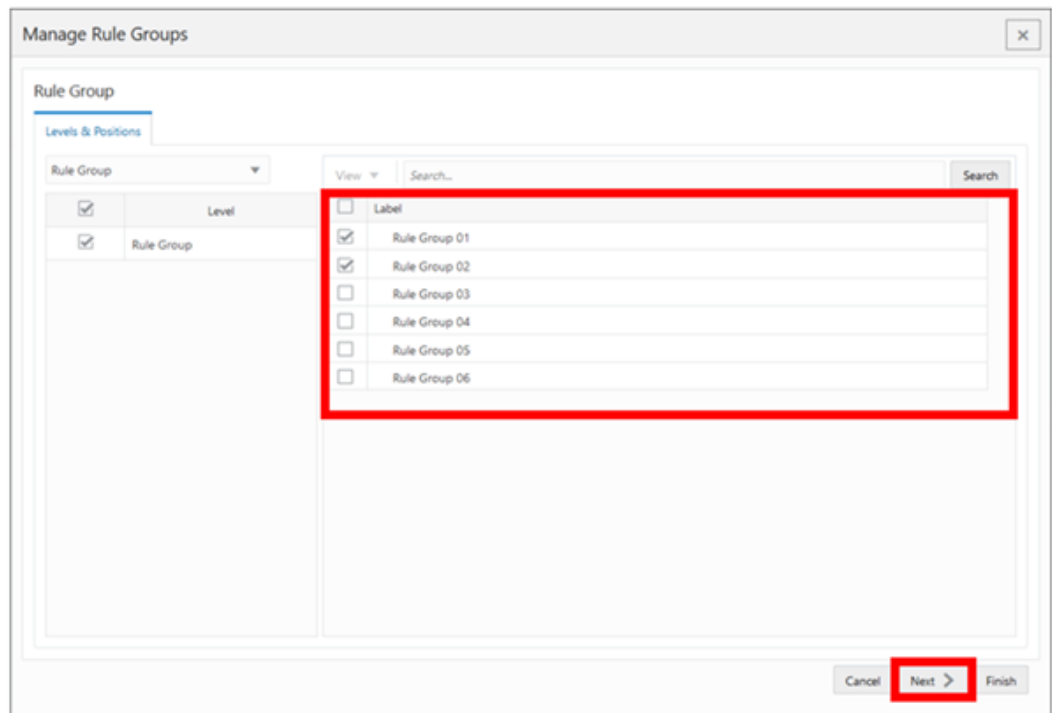


5. Enter a name for your new workspace in the label text box and click **OK**.



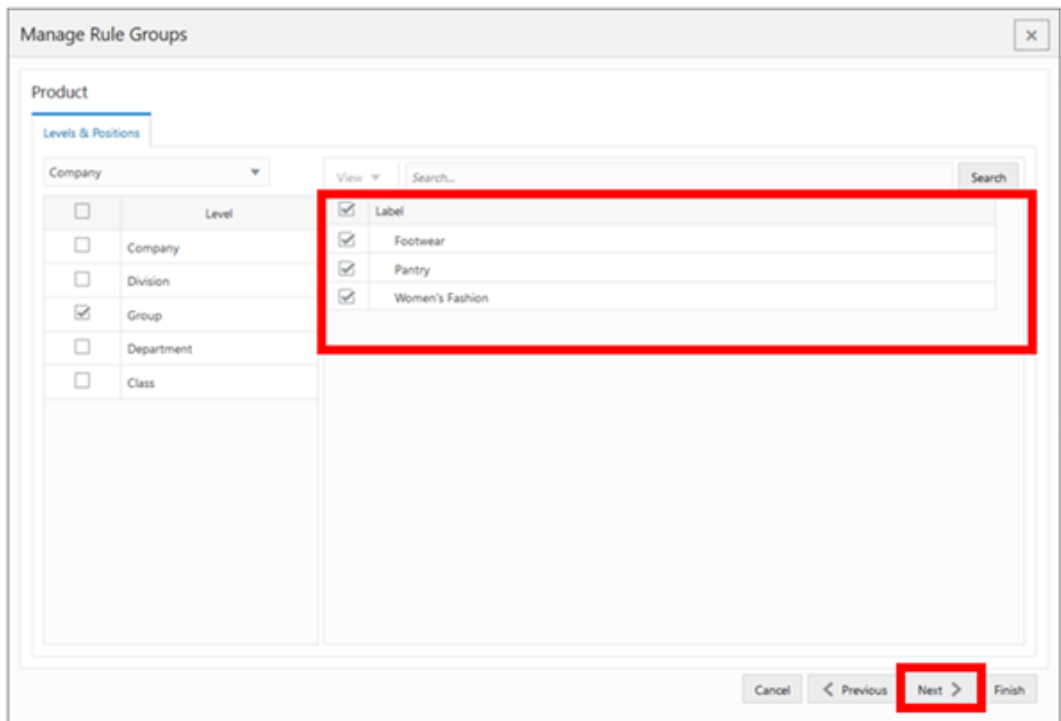
6. The Workspace wizard opens. Select the rule groups you want to work with and click **Next**.

**Figure 16-3 Workspace Wizard: Select Rule Groups**



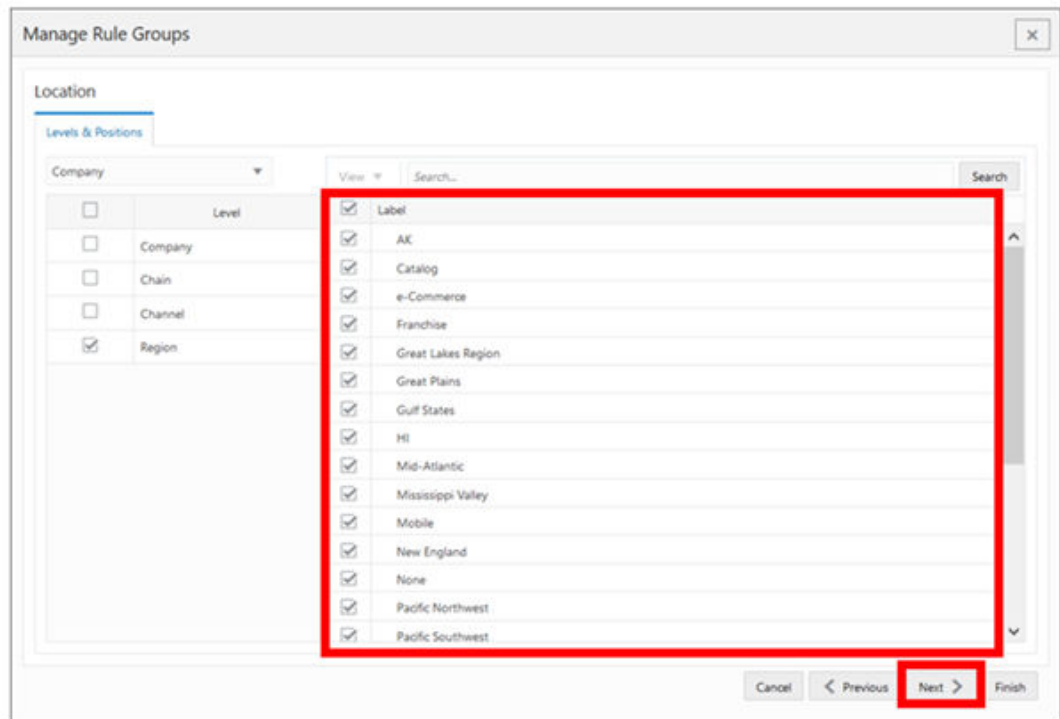
7. The Workspace wizard opens. Select the products you want to work with and click **Next**.

**Figure 16-4 Workspace Wizard: Select Product**



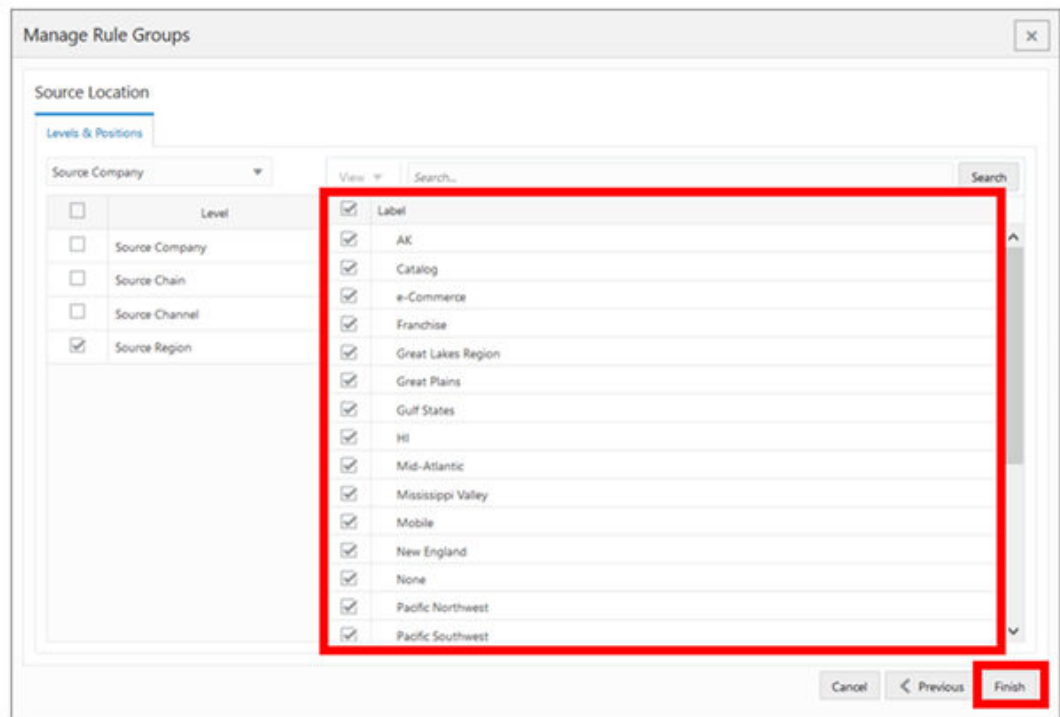
8. Select the locations you want to work with and click **Next**.

**Figure 16-5 Workspace Wizard: Select Location**



9. Select the source locations you want to work with and click **Finish**.

**Figure 16-6 Workspace Wizard: Select Source Location**



10. The wizard notifies you that your workspace is being prepared. Successful workspaces are available from the Dashboard.

**Figure 16-7 Successful Workspace Build: Manage Rule Groups**

The screenshot shows a dashboard with a 'Last 7 days' summary card showing 3 items. Below it are filters for 'All (6)', 'Scheduled (3)', 'In Progress (0)', 'Completed (3)', and 'Failed (0)'. A 'Task Status' section includes an 'Auto-Refresh' toggle and various action buttons. A table lists rule groups with columns for Application, Description, Status, Task Type, Submitted by, Started/Scheduled, and Completed. The first row is highlighted in red.

Application	Description	Status	Task Type	Submitted by	Started/Scheduled	Completed
Inventory Planning Opti...	Rule Groups	Success	WbBatch Build	oci.admin	10/25/23, 2:...	10/25/23, 2:...
Inventory Planning Opti...	RG	Success	WbBatch Build	oci.admin	10/25/23, 2:...	10/25/23, 2:...

## Setup & Publish Step

This step contains these views:

- [Enable & Setup View: Rule Groups](#)
- [Statistics View](#)
- [Today View](#)
- [Product Group Scope View: Rule Groups](#)
- [Location Group Scope View: Rule Groups](#)
- [Source Scope View](#)
- [Attribute Scope View](#)

### Enable & Setup View: Rule Groups

The **Enable & Setup View**, under the **Enable & Setup** tab, allows you to review who published the rule groups and when they were published. Within this view, you can set up the rule group type and a user-friendly description for the rule group.

**Figure 16-8 Enable & Setup View: Rule Groups**

The screenshot shows the 'Enable & Setup' view with tabs for 'Product Scope', 'Location Scope', 'Source Scope', and 'Attribute Scope'. A table lists rule groups with columns for Rule Group Manual Filter, Rule Group Type, Rule Group User Descr., Last Rule Group Publish UserID, and Last Rule Group Publish Date.

Rule Group Manual Filter	Rule Group Type	Rule Group User Descr.	Last Rule Group Publish UserID	Last Rule Group Publish Date
<input type="checkbox"/>	Setup	Setup	uid00000	31/03/2019 15:12:27
<input type="checkbox"/>	Parameters	Parameters	uid00000	31/03/2019 15:12:27

## Enable & Setup View: Rule Groups - Default Profile Measures

The Enable & Setup view contains the following measures.

### Rule Group Manual Filter

This is a checkbox measure that you can select or clear to filter all the views in the workspace by the rule groups selected as manual filters. Only the selected rule groups are available in the workspace. To see all rule groups, all of the rule groups should be cleared. (This is the default behavior).

### Rule Group Type

This is a writeable measure used to define the rule group type. Valid values are:

- **Setup:** The rule group is enabled and its purpose is to be available in the Replenishment Supply Chain Network workspace to set up the supply chain network model.
- **Parameters:** The rule group is enabled and its purpose is to be available in the Replenishment Rules workspace to set up the replenishment method and parameters.
- **\_:** Empty space indicates that the rule group is unavailable.

### Rule Group User Descr.

Rule Group User Description is an editable measure used to define an alternative description of the rule group. This Rule Group User Description can be set as a Visible Attribute for the Rule Group hierarchy in all the workspaces where the hierarchy is available.

### Last Rule Group Publish User ID

This is a calculated measure used to audit the rule group's **Publish Data** button. It is populated with the user ID that last ran the **Publish Data** button.

### Last Rule Group Publish Date

This is a calculated measure used to audit the rule group's **Publish Data** button. It is populated with the date and time that last ran the **Publish Data** button.

## Statistics View

The **Statistics View**, under the **Enable & Setup tab**, allows you to review how many products, locations, and source locations are in scope and associated with each of the Rule Groups.

**Figure 16-9 Statistics View**

Rule Group	Rule Group Valid	PROD Assoc. Count	LOC Assoc. Count	SLOC Assoc. Count	Attribute Assoc. Count	Week Assoc. Count	All PROD - LOC Count	PROD - LOC Valid Count	PROD - LOC Valid %
Rule Group 01	<input checked="" type="checkbox"/>	77	213	213	80	58	8,991	6,853	76.2 %
Rule Group 02	<input checked="" type="checkbox"/>	77	213	213	80	58	6,853	6,853	100.0 %

**Statistics View - Default Profile Measures**

The Statistics view contains the following measures.

**Rule Group Valid**

This is a calculated measure that indicates if a rule group has a valid set up. It is selected when the set up is valid. It is clear when the set up is invalid. An example of an invalid set up is when the rule group is unavailable.

**PROD Assoc. Count**

The Product Association Count is a calculated measure that indicates the number of products associated with the rule group based on the product groups selected in the Product Group Scope view.

**LOC Assoc. Count**

The Location Association Count is a calculated measure that indicates the number of locations associated with the rule group based on the location groups selected in the Location Group Scope view.

**SLOC Assoc. Count**

The Source Location Association Count is a calculated measure that indicates the number of source locations associated with the rule group based on the source location groups selected in the Source Scope view.

**Attribute Assoc. Count**

The Attribute Association Count is a calculated measure that indicates the number of attributes associated with the rule group based on the attributes selected in the Attribute Scope view.

**Week Assoc. Count**

The Week Association Count is a calculated measure that indicates the number of weeks associated with the rule group.

**All PROD-LOC Count**

The All Product-Location Count is a calculated measure that indicates the number of product-location combinations associated with the rule group based on the product and location scopes.

### PROD-LOC Valid Count

The Product-Location Valid Count is a calculated measure that indicates the number of product-location combinations associated with the rule group based on the product and location scopes and the combination is assorted.

### PROD-LOC Valid %

The Product-Location Valid Percentage is a calculated measure that indicates the percentage of assorted products and locations associated with the rule group, compared to the total of the product and location combinations. This measure is calculated as:

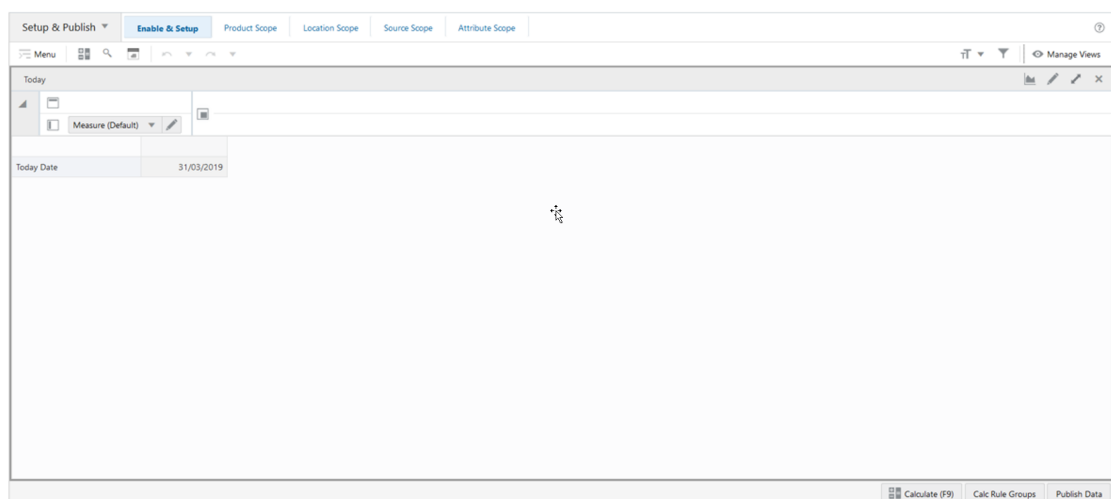
**Figure 16-10 Calculation**

$$100 * \frac{AllPROD - LOCCount}{PROD - LOCValidCount}$$

## Today View

The **Today View**, under the **Today tab**, allows you to check today's date.

**Figure 16-11 Today View**



### Today View - Default Profile Measures

The Today view contains the following measure.

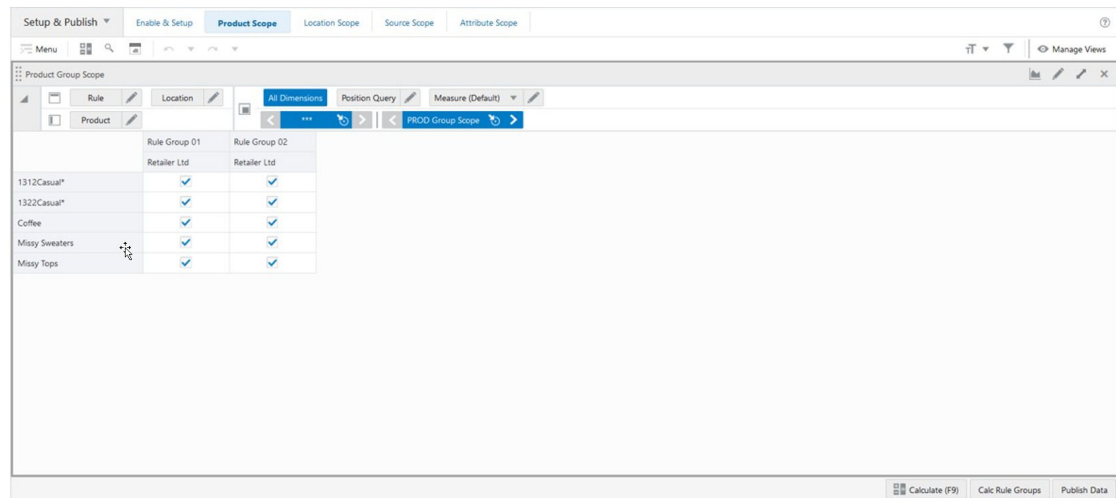
#### Today Date

This is a read-only measure that displays the system date calculated by the batch.

## Product Group Scope View: Rule Group

The **Product Group Scope View**, under the **Product Scope tab**, allows you to select specific products to be included in the rule group.

**Figure 16-12 Product Group Scope View: Rule Group**



### Product Group Scope View: Rule Group - Default Profile Measures

The Product Group Scope view: Rule Group contains the following measures.

#### PROD Group Scope

The Product Group Scope is a checkbox measure used to select which products should be assigned to the rule group.

#### PROD Group Assoc.

The Product Group Associated is a calculated measure that indicates whether the product groups are associated with the rule group or not. The measure is selected if the product groups are associated. If the product groups are not associated, it is clear.

## Location Group Scope View: Rule Group

The **Location Group Scope View**, under the **Location Group Scope tab**, allows you to select the specific locations to be included in the rule group.



**Figure 16-13 Location Group Scope View: Rule Group**

	Rule Group 01			Rule Group 02		
	Footwear	Pantry	Women's Fashion	Footwear	Pantry	Women's Fashion
AK	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Catalog	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
e-Commerce	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Franchise	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Great Lakes Region	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Great Plains	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gulf States	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
HI	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mid-Atlantic	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mississippi Valley	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mobile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
New England	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Pacific Northwest	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Pacific Southwest	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Location Group Scope View: Rule Group - Default Profile Measures**

The Location Group Scope view contains the following measures.

**LOC Group Scope**

Location Group Scope is a checkbox measure used to select which locations should be assigned to the databag.

**LOC Group Assoc.**

Location Group Associated is a calculated measure that indicates whether the location groups are associated with the rule group or not. The measure is selected if the location groups are associated. If the location groups are not associated, it is clear.

**Source Scope View**

The **Source Scope View**, under the **Source Scope tab**, allows you to select specific source locations to be included in the rule group.

**Figure 16-14 Source Scope View**

	Rule Group 01			Rule Group 02		
	Footwear	Pantry	Women's Fashion	Footwear	Pantry	Women's Fashion
1000 Charlotte	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1001 Atlanta	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1002 Dallas	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1003 Boston	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1004 New York	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1005 Philadelphia	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1006 Chicago	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1007 Minneapolis	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1008 St. Louis	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1009 Albuquerque	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1010 Los Angeles	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1023 Seattle	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1024 Portland	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1025 Boise	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

### Source Scope View - Default Profile Measures

The Source Scope view contains the following measures.

#### SLOC Scope

Source Location Scope is a checkbox measure used to select which source locations should be assigned to the rule group.

#### SLOC Assoc.

Source Location Associated is a calculated measure that indicates whether the source locations are associated with the rule group or not. The measure is selected if the source locations are associated. If the source locations are not associated, it is clear.

## Attribute Scope View

The **Attribute Scope View**, under the **Attribute Scope tab**, allows you to select specific attributes to be included in the rule group.

**Figure 16-15 Attribute Scope View**

Attribute	Rule Group 01			Rule Group 02		
	Footwear	Pantry	Women's Fashion	Footwear	Pantry	Women's Fashion
	Retailer Ltd	Retailer Ltd	Retailer Ltd	Retailer Ltd	Retailer Ltd	Retailer Ltd
Chain	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Channel	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Class	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Department	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
District	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Division	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Grandparent	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Item	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Item Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Item Performance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Lead Time	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

### Attribute Scope View - Default Profile Measures

The Attribute Scope view contains the following measures.

#### Attribute Scope

Attribute Scope allows you to select which attributes should be assigned to the rule group.

#### Attribute Assoc.

Attribute Assoc. is a calculated measure that indicates whether the attributes are associated with the rule group or not. The measure is selected if the attributes are associated. The measure is clear if the attributes are not associated.

## Manage Rule Groups Action Buttons

The Manage Rule Group workspace has the following action buttons available:

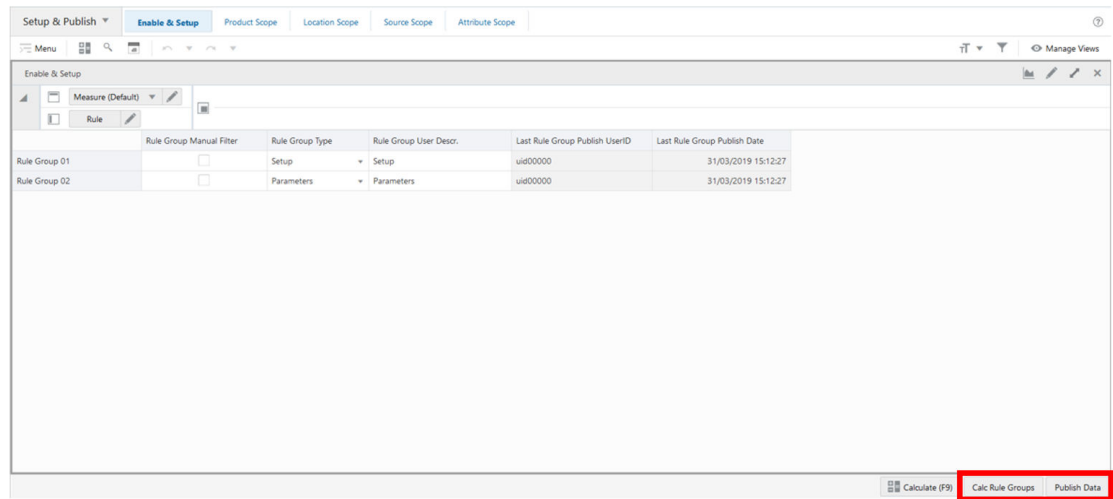
- **Calc Rule Groups**

Use the **Calculation Rule Groups** action button to calculate the rule group's scope based on all setups created by you. The result is a Boolean measure that is used by the Replenishment Setup Rules and Replenishment Parameters Rules workspaces to load the correct scope of products, locations, source locations and attributes.

- **Publish Data**

Use the **Publish Data** action button to commit the changes made in the Manage Rule Groups workspace. It also saves the audit information by updating and committing the measures **Last Rule Group Publish User ID** and **Last Rule Group Publish Date** based on who and when the **Publish Data** was last run.

Figure 16-16 Manage Rule Groups Action Buttons



# 17

## Manage Packs

This chapter describes the functionality that allows you to manage Packs.

### Manage Packs Workspace, Steps, and Views

The following table lists the workspaces, steps, and views of the Manage Packs task.

**Table 17-1** Manage Rule Groups Workspace, Steps, and Views

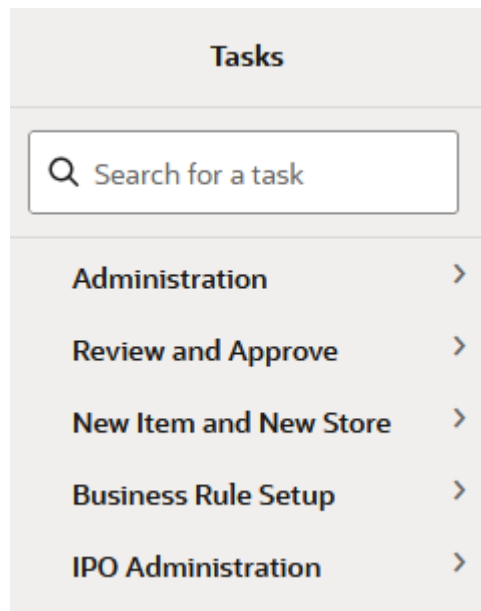
Workspace	Steps	Tab	Views
Manage Packs Workspace	Pack Setup	Pack Setup	Enable View: Manage Packs
			Pack-SKU View
			Packs View

### Manage Packs Workspace

To build the Manage Packs workspace, perform these steps:

1. From the left sidebar menu, click **Task Module** to view the available tasks.

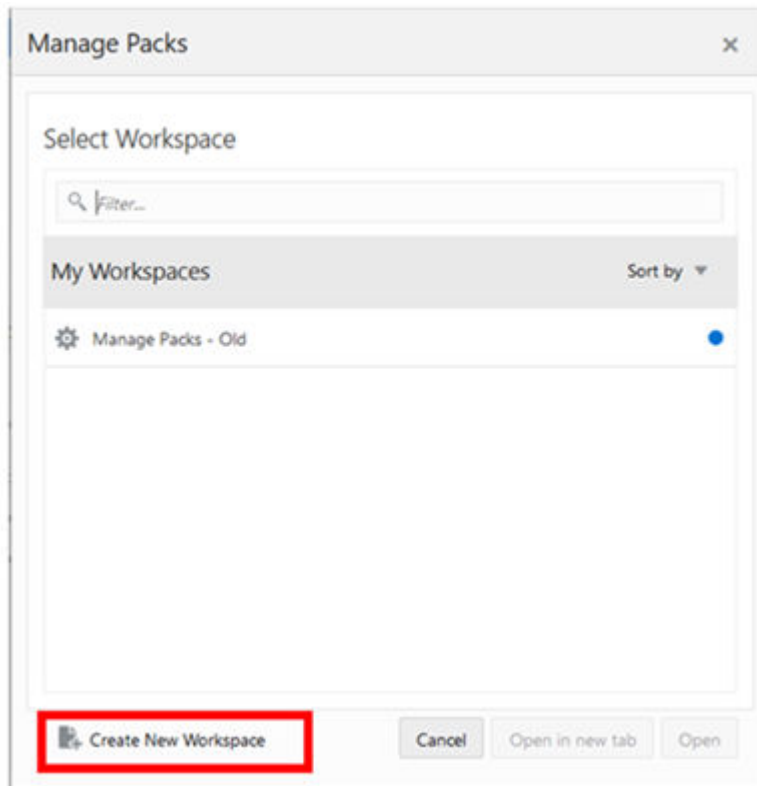
**Figure 17-1** Task Module



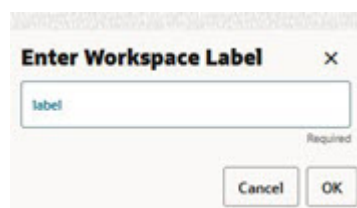
2. Click the **IPO Administration** activity and then click **Lifecycle Allocation and Replenishment** to access the available workspaces.

3. Click **Manage Packs**. The **Manage Packs** wizard opens.
4. You can open an existing workspace, but to create a new workspace, click **Create New Workspace**.

**Figure 17-2 Create New Workspace**

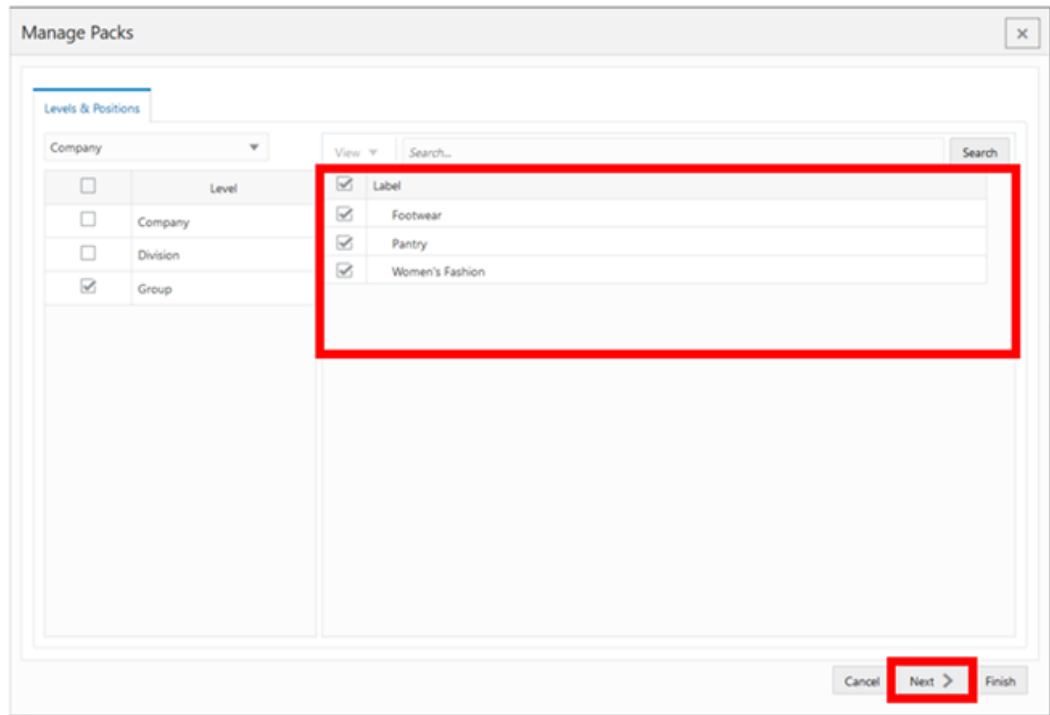


5. Enter a name for your new workspace in the label text box and click **OK**.



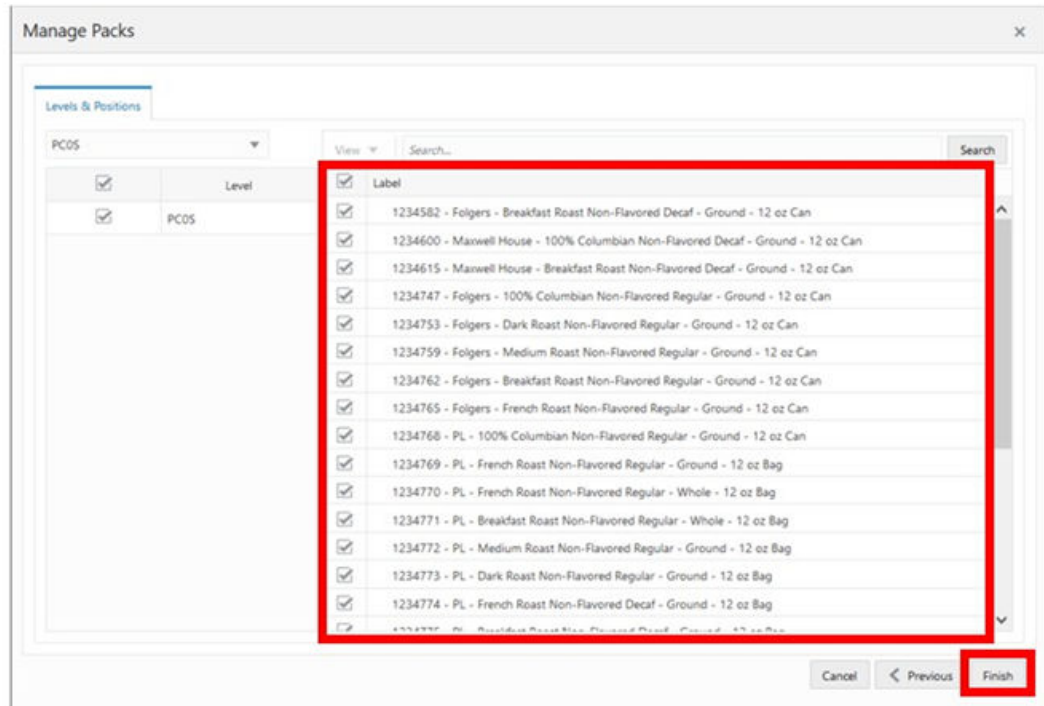
6. The Workspace wizard opens. Select the products you want to work with and click **Next**.

Figure 17-3 Workspace Wizard: Select Product



7. Select the locations you want to work with and click **Finish**.

Figure 17-4 Workspace Wizard: Select Location



8. The wizard notifies you that your workspace is being prepared. Successful workspaces are available from the Dashboard.

Figure 17-5 Successful Workspace Build: Manage Packs

The screenshot shows the Oracle Retail Applications dashboard. The 'Task Status' table is highlighted with a red box, showing a successful build for 'Manage Packs'. The 'Recent Workspaces' list on the right also highlights 'Manage Packs' with a red box.

Description	Status	Task Type	Submitted by	Started/Scheduled	Completed	Record Status
Manage Packs	Success	WebBatch Build	oadmin	12/12/2020 10:05...	12/12/2020 10:05...	NA
Manage Packs - Old	Success	WebBatch Build	oadmin	12/12/2020 10:01...	12/12/2020 10:01...	NA
Manage Packs	Success	WebBatch Build	oadmin	12/12/2020 00:27...	12/12/2020 00:27...	NA

## Pack Setup Step

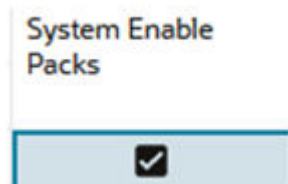
This step contains the following views:

- [Enable View: Manage Packs](#)
- [Pack-SKU View](#)
- [Packs View](#)

### Enable View: Manage Packs

The **Enable View**, under the **Pack Setup** tab, allows you to enable packs in the solution. This is a global setting.

Figure 17-6 Enable View: Manage Packs



### Pack-SKU View

The **Pack-SKU View**, under the **Pack Setup** tab, allows you to review the pack composition. In this view you can select what items are part of the pack and how many units of each assigned item make up the pack.



Figure 17-7 Pack-SKU View

Product	Pack - SKU Ass. Units
1234582 - Folgers - Breakfast	
1234600 - Maxwell House -	
1234615 - Maxwell House -	
1234747 - Folgers - 100%	
1234753 - Folgers - Dark Roast	
1234759 - Folgers - Medium	
1234762 - Folgers - Breakfast	
1234765 - Folgers - French	
1234768 - PL - 100%	
1234769 - PL - French Roast	
1234770 - PL - French Roast	
1234771 - PL - Breakfast Roast	
1234772 - PL - Medium Roast	
1234773 - PL - Dark Roast	
1234774 - PL - French Roast	

## Packs View

The **Packs View**, under the **Pack Setup** tab, allows you to review the pack information for each product. For example, the pack type and the number of products within the pack.

Figure 17-8 Packs View

Product	Pack Type	Size Desc.	Pack - SKU Ass. Count	Pack - SKU Ass. Units	Pack User Filter
1234582 - Folgers - Breakfast	Simple	-			<input type="checkbox"/>
1234600 - Maxwell House -	Simple	-			<input type="checkbox"/>
1234615 - Maxwell House -	Simple	-			<input type="checkbox"/>
1234747 - Folgers - 100%	Simple	-			<input type="checkbox"/>
1234753 - Folgers - Dark Roast	Simple	-			<input type="checkbox"/>
1234759 - Folgers - Medium	Simple	-			<input type="checkbox"/>
1234762 - Folgers - Breakfast	Simple	-			<input type="checkbox"/>
1234765 - Folgers - French	Simple	-			<input type="checkbox"/>
1234768 - PL - 100%	Simple	-			<input type="checkbox"/>
1234769 - PL - French Roast	Simple	-			<input type="checkbox"/>
1234770 - PL - French Roast	Simple	-			<input type="checkbox"/>
1234771 - PL - Breakfast Roast	Simple	-			<input type="checkbox"/>
1234772 - PL - Medium Roast	Simple	-			<input type="checkbox"/>
1234773 - PL - Dark Roast	Simple	-			<input type="checkbox"/>
1234774 - PL - French Roast	Simple	-			<input type="checkbox"/>
1234775 - PL - Breakfast Roast	Simple	-			<input type="checkbox"/>

### Packs View - Default Profile Measures

The Packs view contains the following measures.

#### Pack Type

This is a loaded measure used to indicate the product's pack type. Either simple or complex.

#### Size Desc.

The Size Description is a loaded measure used to indicate the product's pack description.

### Pack SKU Ass. Count

This is a calculated measure used to indicate the total number of products (SKU) in the pack.

### Pack SKU Ass. Unit

This is an editable measure used to indicate the total number of component units (SKU) that belong to the pack.

### Pack User Filter

This is an editable measure used to apply a filter to the Pack-SKU view by the selected packs. When the packs are selected, and after the workspace calculation (**Calculate** or **F9**) is run, the Pack-SKU view is filtered based on the selected packs.

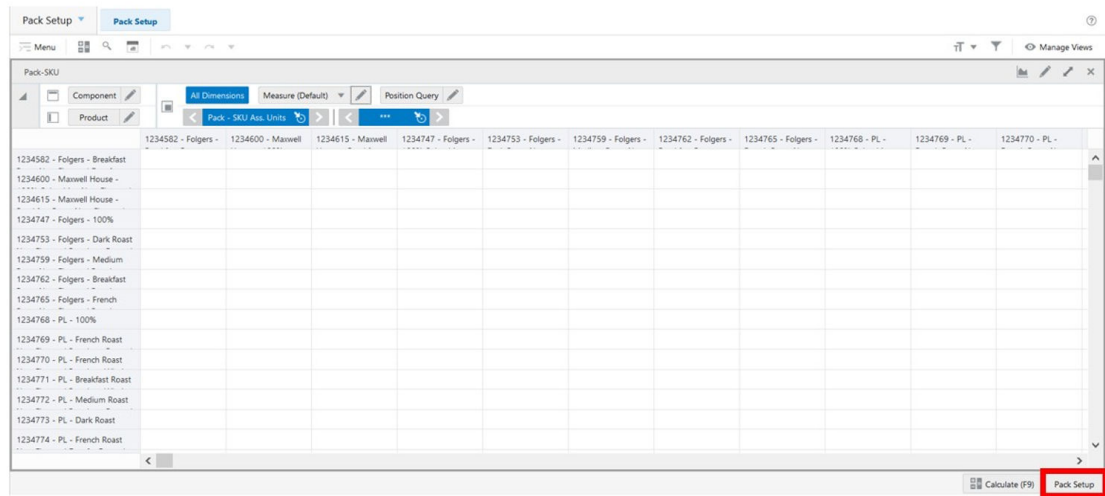
## Manage Packs Action Buttons

The Manage Packs workspace has the following action button available:

### Pack Setup

This action button is responsible to calculate the pack information based on the available pack set up.

**Figure 17-9** Manage Packs Action Button



# 18

## Manage Allowed Transfer

This chapter describes the functionality that allows you to manage allowed transfers.

### Manage Allowed Transfer Workspace, Steps, and Views

The Manage Allowed Transfer workspace allows you to manage what locations are allowed to have transfers. You can manage a location matrix where to select if a transfer between the locations in the matrix are allowed or not. The columns in the view represent the transfers' destination location and the rows represent the transfer's source location.

The following table lists the workspaces, steps, and views of the Manage Allowed Transfer task.

**Table 18-1** Manage Allowed Transfer Workspace, Steps, and Views

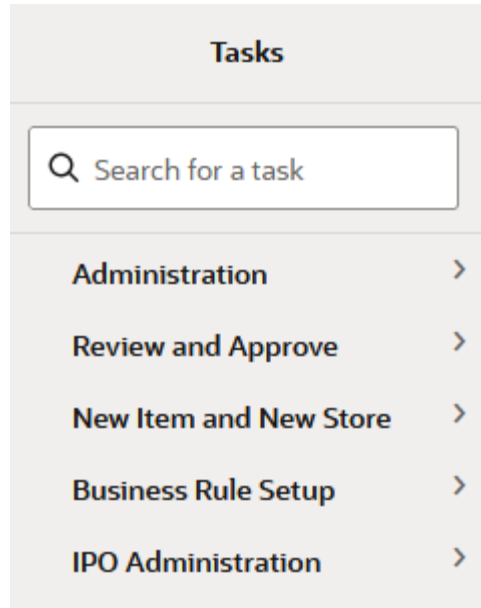
Workspace	Steps	Tab	Views
<a href="#">Manage Allowed Transfer Workspace</a>	<a href="#">Allowed Transfer</a>	Allowed Transfer	<a href="#">Allowed Transfer View</a>

### Manage Allowed Transfer Workspace

To build the Manage Allowed Transfer workspace, perform these steps:

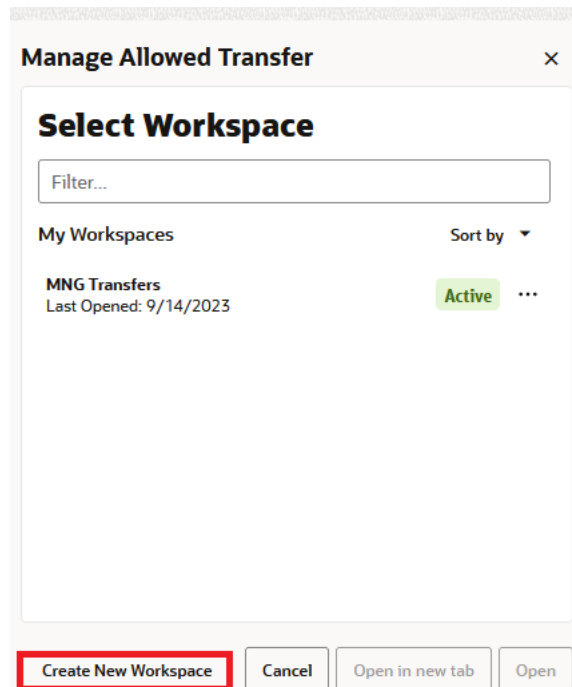
1. From the left sidebar menu, click **Task Module** to view the available tasks.

Figure 18-1 Task Module

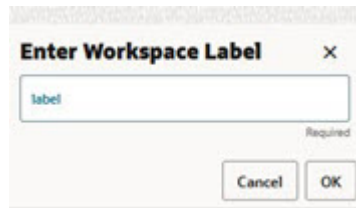


2. Click the **IPO Administration** activity and then click **Lifecycle Allocation and Replenishment** to access the available workspaces.
3. Click **Manage Allowed Transfer**. The **Manage Allowed Transfer** wizard opens.
4. You can open an existing workspace, but to create a new workspace, click **Create New Workspace**.

Figure 18-2 Create New Workspace

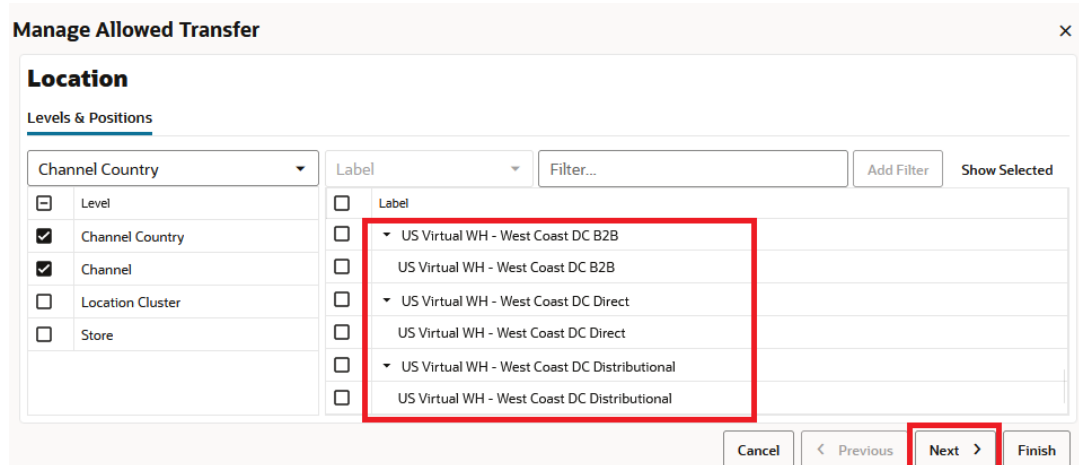


5. Enter a name for your new workspace in the label text box and click **OK**.



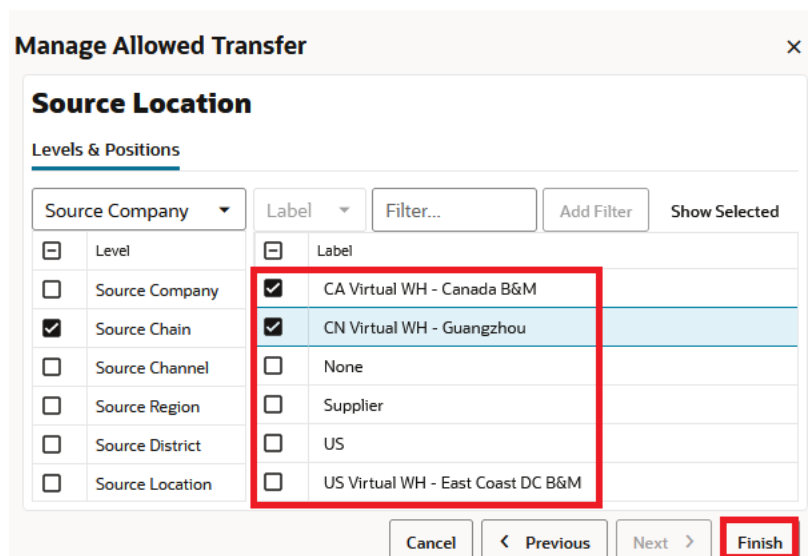
6. Select the locations you want to work with and click **Next**.

**Figure 18-3 Workspace Wizard: Select Location**



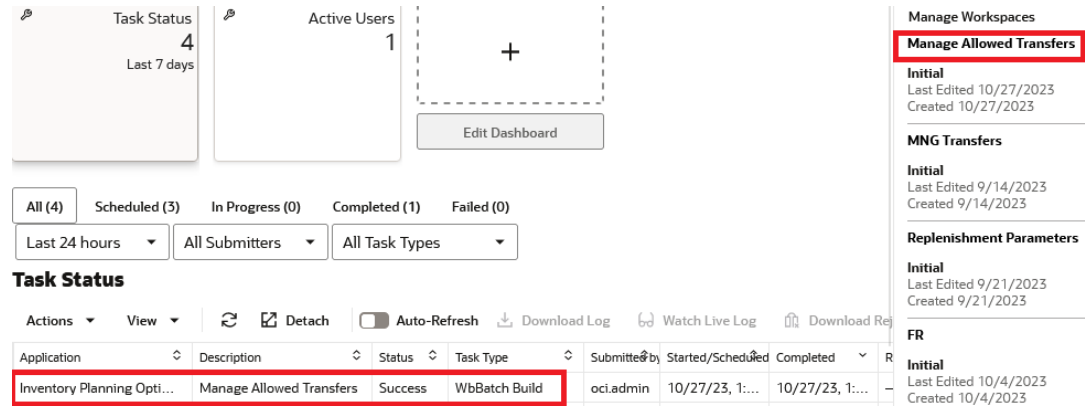
7. Select the source locations you want to work with and click **Finish**.

**Figure 18-4 Workspace Wizard: Select Source Location**



8. The wizard notifies you that your workspace is being prepared. Successful workspaces are available from the Dashboard.

Figure 18-5 Successful Workspace Build: Manage Allowed Transfer



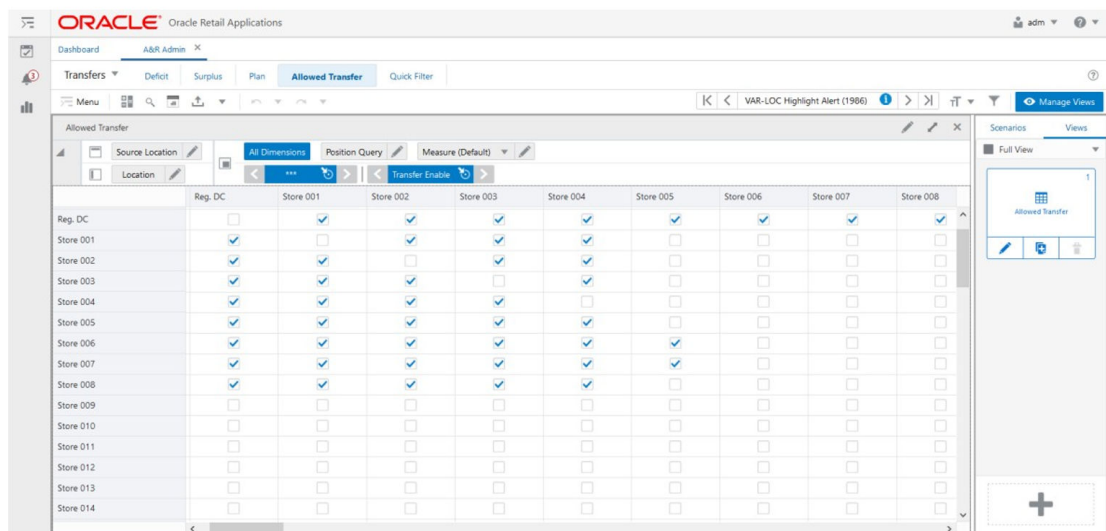
## Allowed Transfer Step

This step contains the [Allowed Transfer View](#).

## Allowed Transfer View

The **Allowed Transfer View**, under the **Allowed Transfer tab**, allows you to manage which locations are allowed to have transfers. You can manage a location matrix to select if a transfer between the locations in the matrix is allowed or not. The columns in the view represent the transfers' destination location and the rows represent the transfers' source location.

Figure 18-6 Allowed Transfer View



### Allowed Transfer View - Default Profile Measures

The Allowed Transfer view contains the following measure.

#### Transfer Enable

This is an editable measure for you to allow or disallow transfers between source locations and destination locations. When selected, transfers are allowed. A transfer that is clear is not allowed.

# 19

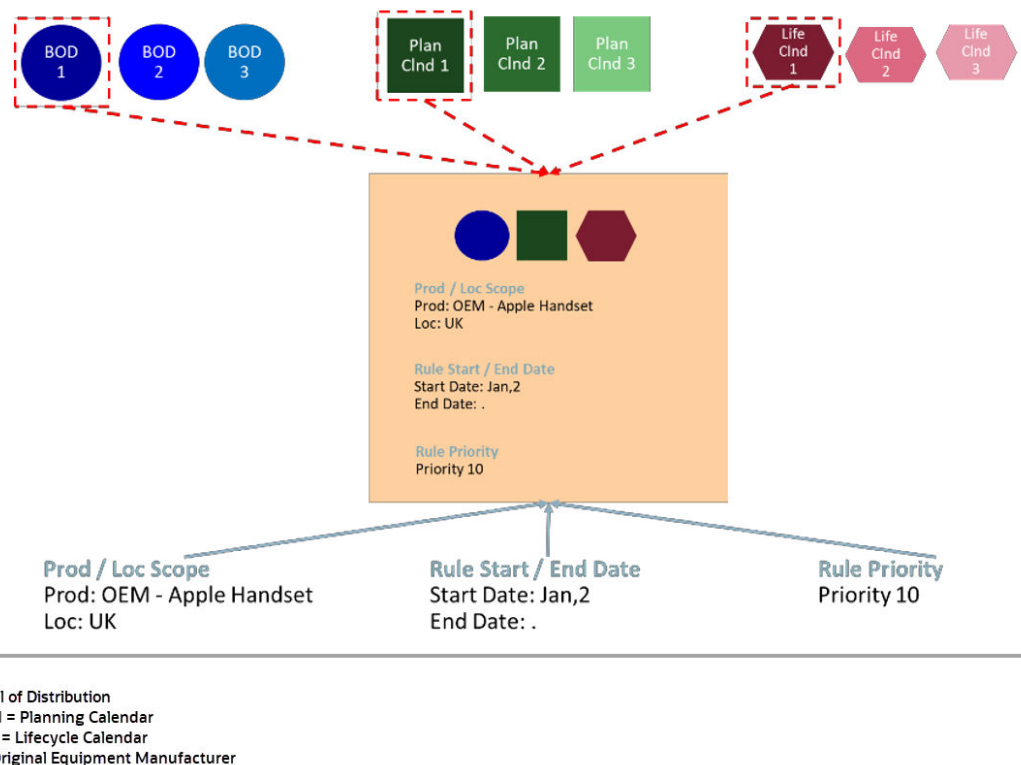
## Supply Chain Network

This chapter describes the functionality that allows you to set up and review the supply chain network model to be used by the IPOCS-Lifecycle Allocation and Replenishment calculations.

The Supply Chain Network Workspace is where you can set up the Bill of Distribution, Planning Calendars, and Lifecycle Calendars. Once they are defined you can configure rules and conditions to specify where they should be applied. The IPOCS-Lifecycle Allocation and Replenishment Rule Engine does the heavy work for you and calculates the correct Bill of Distribution, Planning Calendars, Assortment Calendars, and Lifecycle Calendars at the product and location level using the available assortment and lifecycle information.

You can further leverage the IPOCS-Lifecycle Allocation and Replenishment Rules Engine and specify the period where the rule should apply (start and end date if applicable) and the priority of the rule to allow IPOCS-Lifecycle Allocation and Replenishment to pick the most suitable rule based on the priority.

**Figure 19-1 IPOCS-Lifecycle Allocation and Replenishment Setup Rules Illustration**



## Supply Chain Network Workspace, Steps, and Views



The following table lists the workspaces, steps, and views for the Supply Chain Network task.

**Table 19-1 Supply Chain Network Workspace, Steps, and Views**

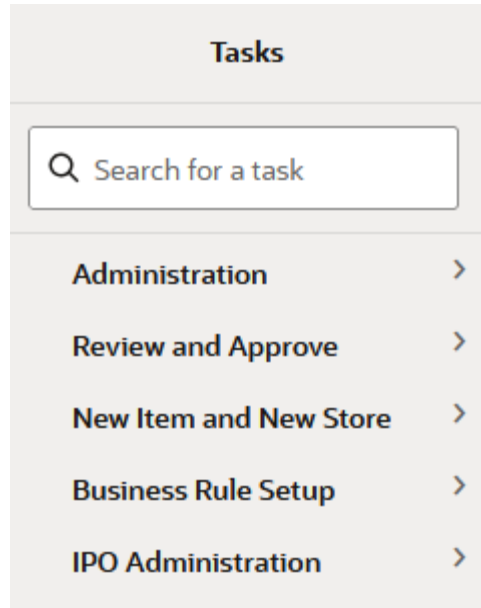
Workspace	Steps	Tab	Views		
Supply Chain Network Workspace	Overview	Overview	Statistics View		
		Scope	Location Scope View Product Scope View		
	Bill of Distributions	Bill of Distributions	Bill of Distributions View	Valid Source Locations View	
			Planning Calendars	Planning Calendars View Day of Week View Daily Exceptions View	
	Lifecycle Calendars	Lifecycle Calendars	Lifecycle Calendars View	Lifecycle Phases View	
			Rules	Setup	Rule Views
	Review	SKU-LOC View			SKU-LOC-Week View SKU-LOC-Phases View
		Filter		Filter	Calendar Filter View

## Supply Chain Network Workspace

The Supply Chain Network workspace allows you to access all the views listed in the Supply Chain Network Workspaces, Steps, and Views. To build the Supply Chain Network workspace, perform these steps:

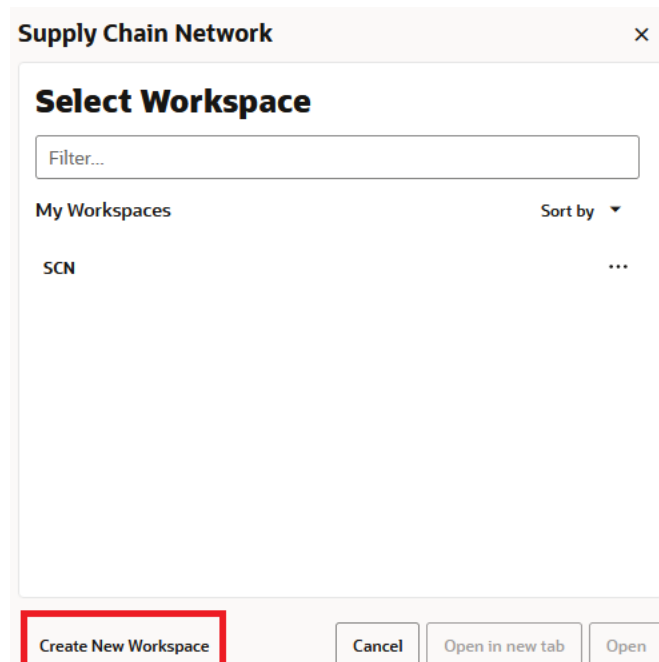
1. From the left sidebar menu, click **Task Module** to view the available tasks.

Figure 19-2 Task Module

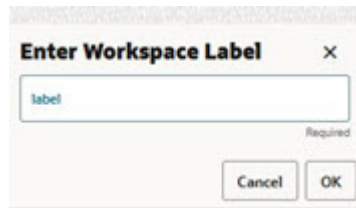


2. Click the **Business Rules Setup** activity to access the available workspaces.
3. Click **Supply Chain Network**. The **Supply Chain Network** wizard opens.
4. You can open an existing workspace, but to create a new workspace, click **Create New Workspace**.

Figure 19-3 Supply Chain Network Wizard: Create New Workspace



5. Enter a name for your new workspace in the label text box and click **OK**.

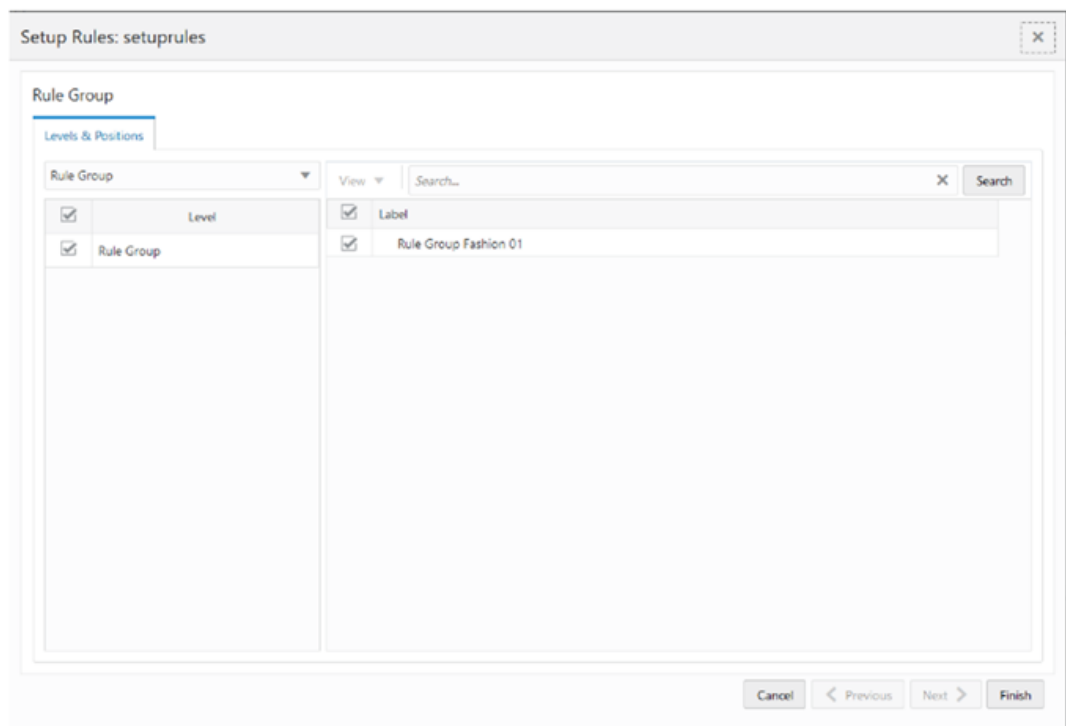


- The Workspace wizard opens. Select the rule group you want to work with and click **Finish**.

 **Note:**

Only the rule groups that are from the Setup rule group type are available for selection. The rule group type value is managed in the Manage Rule Groups workspace.

**Figure 19-4 Workspace Wizard: Select Rule Group**

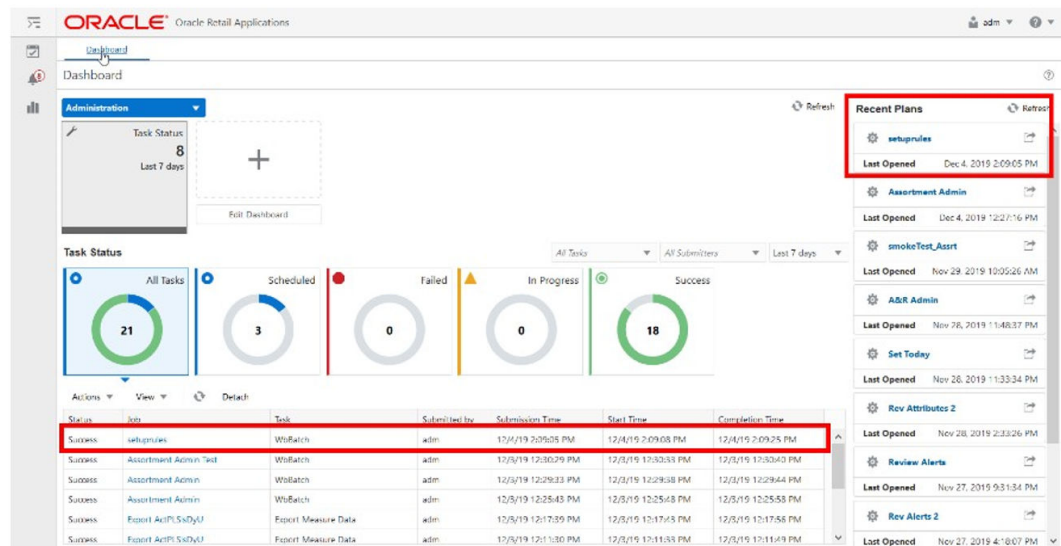


- The wizard notifies you that the workspace is being prepared. Successful workspaces are available from the Dashboard.

 **Note:**

The workspace is built using the selected rule group scope. The products, locations, source locations and attributes available in the workspace are the ones in the rule group scope that is managed in the Manage Rule Groups workspace.

Figure 19-5 Successful Workspace Build: Supply Chain Network



## Overview Step

This step contains these views:

- [Statistics View](#)
- [Location Scope View](#)
- [Product Scope View](#)

## Statistics View

The **Statistics View**, under the **Overview tab**, allows you to check the statistics of the Supply Chain Network. The view has statistical information regarding the number of valid counts for each set up (for example, Bill of Distribution, Planning Calendar) and rules. It also provides the number of product and location combinations and the number of Network Loop errors.

Figure 19-6 Statistics View

The screenshot shows the Oracle Retail Applications interface. The main content area displays a table of statistics for a rule group. The table includes the following data:

Rule Group Type	Setup
Rule Group User Descr.	Setup
Last Rule Group Publish UserID	trainingadm1
Last Rule Group Publish Date	09/13/2019
BOD Valid Count	2
Plc. Valid Count	1
Lfc. Valid Count	1
Rule Valid Count	2
All PL Count	6.992
PL Valid Count	6.688
PL Valid %	95.7%
Network Loop @ Today Count	

The sidebar on the right shows a 'Views' section with a 'Full View' dropdown. The 'Statistics' view is highlighted with a red box, indicating it is the active view.

### Statistics View - Default Profile Measures

The Statistics View contains the following measures.

#### Rule Group Type

The Rule Group Type is a loaded read-only measure to display the rule group type that was set up for the rule group in the Manage Rule Group workspace.

Valid values are:

- **Setup:** The rule group is enabled and its purpose is to be available in the Replenishment Supply Chain Network workspace to set up the supply chain network model.
- **Parameters:** The rule group is enabled and its purpose is to be available in the Replenishment Rules workspace to set up the replenishment method and parameters.
- **\_:** Empty space indicates that the rule group is unavailable.

#### Rule Group User Desc.

The Rule Group User Description is a loaded read-only measure to display your description that was set up for the rule group in the Manage Rule Group workspace.

#### Last Rule Group Publish User ID

The Last Rule Group Publish User ID is a loaded read-only measure to display your identifier that performed the last rule group's change in the Manage Rule Group workspace.

#### Last Rule Group Publish Date

The Last Rule Group Publish Date is a loaded read-only measure to display the date and time when the last rule group's change was performed in the Manage Rule Group workspace.

**BOD Valid Count**

The Bill of Distributions Valid Count is a calculated measure to display the total number of valid bills of distributions (BOD) that are set up for the rule group.

**Plc. Valid Count**

The Planning Calendar's Valid Count is a calculated measure to display the total number of valid planning calendars (Plc) that are set up for the rule group.

**Lfc. Valid Count**

The Lifecycle Calendar's Valid Count is a calculated measure to display the total number of valid lifecycle calendars (Lfc) that are set up for the rule group.

**Rule Valid Count**

The Rule Valid Count is a calculated measure to display the total number of valid rules that are set up for the rule group.

**All PL Count**

The All Product and Location Count is a calculated measure to display the total number of product and location combinations that have a lifecycle phase value.

**PL Valid Count**

The Product and Location Valid Count is a calculated measure to display the total number of product and location combinations that have a valid rule assigned.

**PL Valid %**

The Product and Location Valid Percentage is a calculated measure used to indicate, in percentage, how much the product and location combinations with a valid rule assigned represent the total of product and location combinations with a lifecycle phase value. The value of this measure is the result of the formula:

**Figure 19-7 Calculation**

$$100 * \frac{PL\ Valid\ Count}{All\ PL\ Count}$$

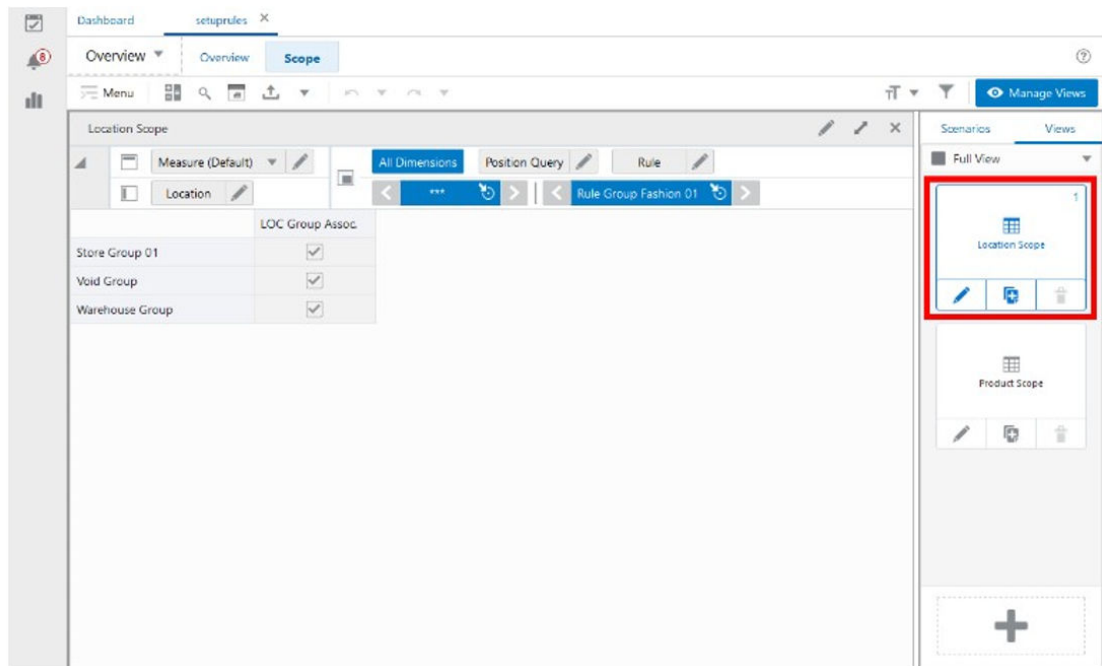
**Network Loop @ Today Count**

The Network Loop @ Today Count is a calculated measure to display the total number of Network Loop errors caused by the BOD set up for the rule group.

## Location Scope View

The **Location Scope View**, under the **Scope tab**, allows you to check what specific locations are in the scope of a rule group and loaded into the workspace.

Figure 19-8 Location Scope View



### Location Scope View - Default Profile Measures

The Location Scope View contains the following measure.

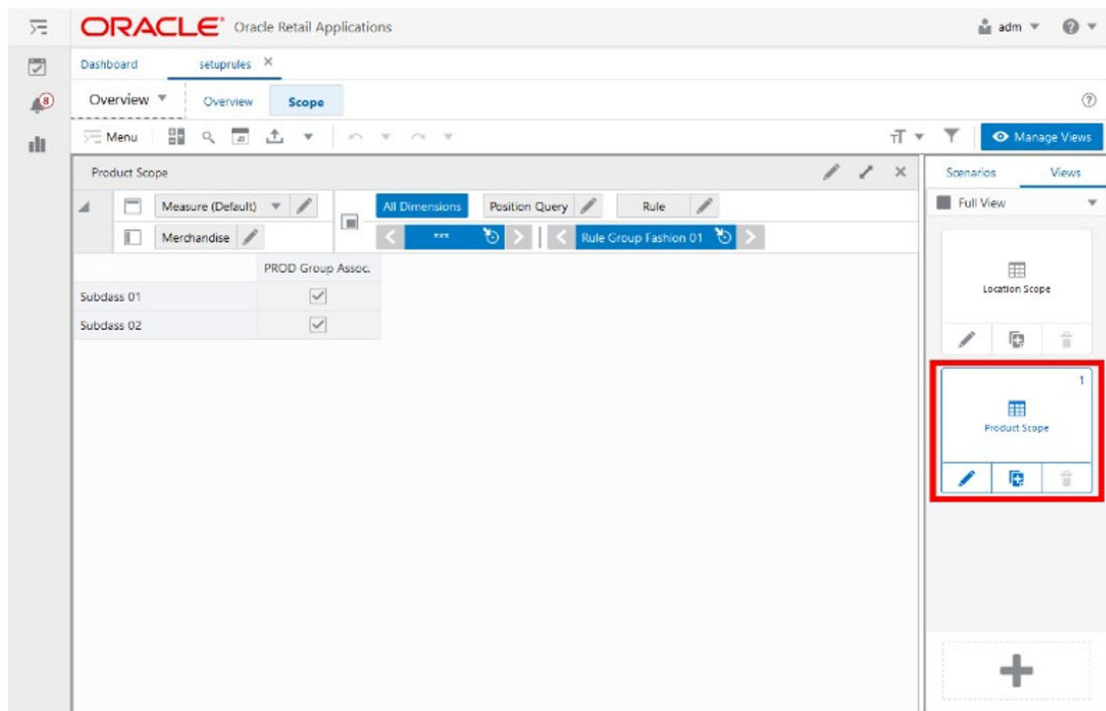
#### LOC Group Assoc.

The Location Group Associated is a loaded read-only measure used to indicate the location groups that are associated with the rule group. This measure is managed in the Manage Rule Groups workspace.

## Product Scope View

The **Product Scope View**, under the **Scope tab**, allows you to check what specific products are in the scope of a rule group and loaded into the workspace.

**Figure 19-9 Product Scope View**



### Product Scope View - Default Profile Measures

The Product Scope View contains the following measure.

#### **PROD Group Assoc.**

The Product Group Associated is a loaded read-only measure used to indicate the products groups that are associated with the rule group.

## Bill of Distributions Step

This step contains these views:

- [Bill of Distributions View](#)
- [Valid Source Locations View](#)

In IPOCS-Lifecycle Allocation and Replenishment, the Bill of Distribution (BOD) defines the lead time for all supplying sources available throughout the supply chain network. Lead time is defined as the number of days a shipment takes to arrive between the source and the target.



**Figure 19-10 IPOCS-Lifecycle Allocation and Replenishment Bill of Distributions Illustration**



Source	Lead Time
Supplier A	3
Supplier B	2
Supplier B	5
Warehouse 1	1
Warehouse 2	2
Warehouse 2	1

## Bill of Distributions View

The **Bill of Distributions View**, under the **Bill of Distributions tab**, allows you to perform all possible setups for the source of supply chain network. The setup is then used in the rules and based on the rule set up it is associated with, down to item and location level (lowest level of Prod-Loc).

**Figure 19-11 Bill of Distributions View**

	BOD Enable	BOD Valid	BOD Desc	BOD User Desc	Primary Source	Lead Time Dur (d)	Reserved Source 1	Re
L.01	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Store Group 1] Warehouse:2d,R1,R2	Store Group 1	Warehouse	2d	WH Rsvd 1	W
L.02	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Store Group 2] Reg. DC:Jc,K1	Store Group 2	Reg. DC	2d	WH Rsvd 1	-
L.03	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Store Group Web] Warehouse:0d	Store Group Web	Warehouse	d	-	-
L.04	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Reg DC] Warehouse:5d	Reg DC	Warehouse	5d	-	-
L.05	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Warehouse] Supplier:20d	Warehouse	Supplier	20d	-	-
L.06	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Void] Void:0d	Void	Void	d	-	-
L.07	<input type="checkbox"/>	<input type="checkbox"/>				d	-	-
L.08	<input type="checkbox"/>	<input type="checkbox"/>				d	-	-
L.09	<input type="checkbox"/>	<input type="checkbox"/>				d	-	-
L.10	<input type="checkbox"/>	<input type="checkbox"/>				d	-	-
L.11	<input type="checkbox"/>	<input type="checkbox"/>				d	-	-
L.12	<input type="checkbox"/>	<input type="checkbox"/>				d	-	-
L.13	<input type="checkbox"/>	<input type="checkbox"/>				d	-	-
L.14	<input type="checkbox"/>	<input type="checkbox"/>				d	-	-

### Bill of Distributions View - Default Profile Measures

The Bill of Distributions View contains the following measures.

#### BOD Enable

The Bill of Distributions Enable is an editable measure to enable or disable a bill of distribution. Each row (or list) represents a different BOD.

#### BOD Valid

The Bill of Distributions Valid is a calculated measure used to indicate if the set up of the BOD is valid or not. For example, if the primary source is missing then the BOD is not valid for IPOCS-Lifecycle Allocation and Replenishment.

## BOD Desc

The Bill of Distributions Description is a calculated measure used to indicate the BOD description. The description is calculated based on the BOD user-defined description and the BOD set up. The pattern applied is the following:

- When no Reserved source is set up:  
**[BOD User Desc]+ +[Primary Source]+.[ Lead Time]**
- When only Reserved source 1 is set up:  
**[BOD User Desc]+ +[Primary Source]+.[ Lead Time]+.R1**
- When only Reserved source 2 is set up:  
**[BOD User Desc]+ +[Primary Source]+.[ Lead Time]+.R2**
- When both Reserved source are set up:  
**[BOD User Desc]+ +[Primary Source]+.[ Lead Time]+.R1.R2**

## BOD User Desc

The Bill of Distributions User Description is an editable measure to input a user-defined BOD description. The final BOD description takes into consideration your defined description. The entered value must not contain a colon punctuation mark (:).

## Primary Source

The Primary Source is an editable measure to select, from a picklist, a primary source for the BOD. The list of sources presented to you in the picklist are the sources that are enabled as a valid location source in the Valid Source Locations view.

## Lead Time

The Lead Time is an editable measure to define the lead time, in number of days, for the BOD.

## Reserved Source 1

The Reserved Source 1 is an editable measure to select, from a picklist, a reserved source for the BOD. The list of sources presented to you in the picklist are the sources that are enabled as valid reserved sources in the Valid Source Locations view.

## Reserved Source 2

The Reserved Source 2 is an editable measure to select, from a picklist, an additional reserved source for the BOD. The list of sources presented in the picklist are the sources that are enabled as valid reserved sources in the Valid Source Locations view.

## Alternative Source

The Alternative Source is an editable measure to select, from a picklist, an alternative source to the primary source for the BOD. The list of sources presented in the picklist are the sources that are enabled as Valid Source Locations in the Valid Source Locations view.

## Rule BOD Count

The Rule Bill of Distributions Count is a calculated measure to display the total number of rules that are using the BOD.

## PL BOD Count

The Product and Location Bill of Distributions Count is a calculated measure to display the total number of product and location combinations that are associated with the BOD.

## PL BOD %

The Product and Location Bill of Distributions Percentage is a calculated measure used to indicate, in percentages, how much the product and location combinations associated with the BOD represent in the total of product and location combinations with a lifecycle phase value. The value of this measure is the result of the formula:

**Figure 19-12 Calculation**

$$100 * \frac{PL\ BOD\ App.\ Count}{All\ PL\ Count}$$

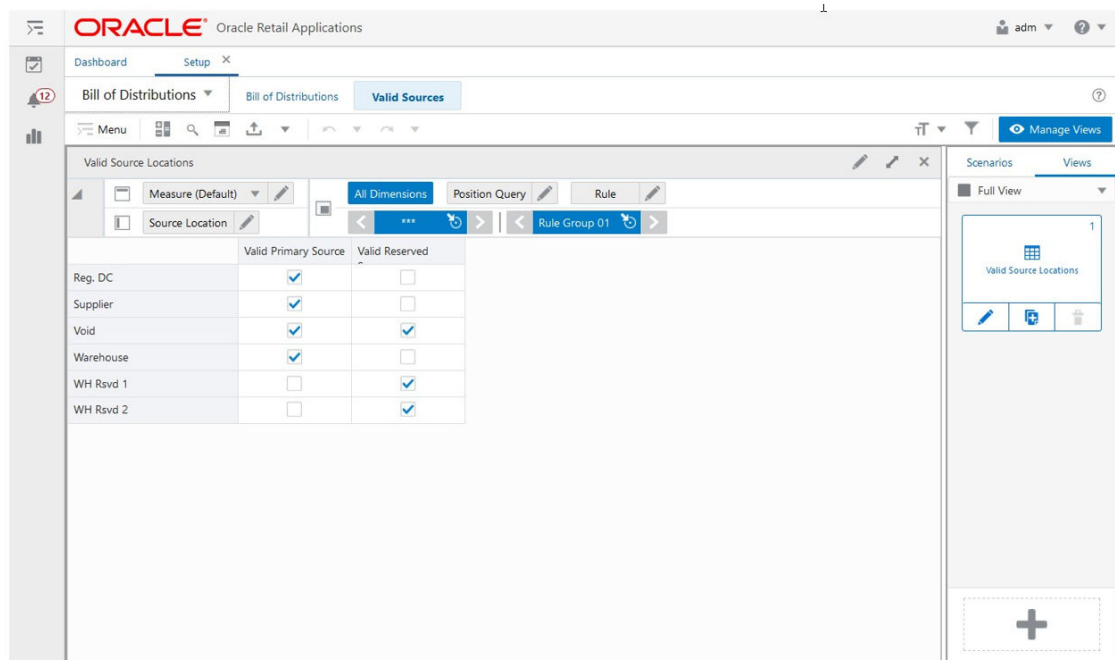
## BOD User Filter

The Bill of Distributions User Filter is an editable measure to select the BOD to filter the views by the selected BOD. This measure is used by the **Run Filter** action button responsible to calculate the filters applied to the views within the Supply Chain Network workspace.

## Valid Source Locations View

The **Valid Source Locations View**, under the **Valid Sources tab**, allows you to select which locations are primary sources or reserved sources. This set up is used by the Primary Source and Reserved Source measures in the Bill of Distributions view to display the correct source location to you.

**Figure 19-13 Valid Source Locations View**



### Valid Source Locations View - Default Profile Measures

The Valid Source Locations View contains the following measures.

#### Valid Primary Source

The Valid Primary Source is an editable measure to define a location possible location to be used by the bill of distributions as the primary source or alternate source.

#### Valid Reserved Source

The Valid Reserved Source is an editable measure to define a possible location to be used by the bill of distributions as a reserved source.

## Planning Calendars Step

This step contains these views:

- [Planning Calendars View](#)
- [Day of Week View](#)
- [Daily Exceptions View](#)

In IPOCS-Lifecycle Allocation and Replenishment the Planning Calendar (Plc) is used to specify the location's ordering/receiving patterns along with the associated planning horizon that IPOCS-Lifecycle Allocation and Replenishment should plan for. IPOCS-Lifecycle Allocation and Replenishment works with two types of calendars:

- **Review Calendar:** Use this calendar for point-in-time replenishments
- **Receipt Calendar:** Use this calendar for time-phased replenishments

Both calendars allow for two methods to set up a Planning Calendar:

- **Day of Week:** Main method to select the review or receipt dates, by selecting a day of the week, (for example, Monday) regardless of the dates
- **Exception:** Method to configure exceptions by selecting specific dates (days) that are an exception to the day of week set up.

**Figure 19-14 Planning Calendar Day of Week Setup Illustration (Review & Receipt)**

Day of Week	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Review	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		
Review	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Review			<input checked="" type="checkbox"/>				

Day of Week	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Receipt	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		
Receipt	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Receipt			<input checked="" type="checkbox"/>				

**Figure 19-15 Planning Calendar Exception Setup Illustration (Review & Receipt)**

Day of Week	Review Exception	Review Active
2019.02.03	Default	
2019.02.04	Default	<input checked="" type="checkbox"/>
2019.02.05	Off	
2019.02.06	On	<input checked="" type="checkbox"/>

Day of Week	Receipt Exception	Receipt Active
2019.02.03	Default	
2019.02.04	Default	<input checked="" type="checkbox"/>
2019.02.05	Off	
2019.02.06	On	<input checked="" type="checkbox"/>

The planning calendar set up is used in the rules and based on the rule set up it is associated with down to the item and location levels (lowest level of Prod-Loc). This set up is also used by the IPOCS-Lifecycle Allocation and Replenishment Engine to plan what the next review day or receipt day is.

## Planning Calendars View

The **Planning Calendars View**, under the **Planning Calendars tab**, allows you to set up a planning calendar and specify the time horizon to be used. The set up of the planning calendar is completed by the set up in the views Day of Week and Daily Exceptions.

Figure 19-16 Planning Calendars View

	Plc. Enable	Plc. Valid	Plc. Desc	Plc. User Desc	Plc. Horizon Dur (d)	Rule Plc. Count	PL Plc. Count
L01	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Store Group 1] Mon.Wed.Fri	Store Group 1	180d	4	4.56
L02	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Store Group 2] Tue.Thu	Store Group 2	180d	1	3.34
L03	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Store Group Web] Mon.Tue.Wed.Thu.Fri.Sat.Sun	Store Group Web	180d	1	30
L04	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[WH Group] Mon	WH Group	180d	4	61
L05	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Off] Off	Off	d	4	91
L06	<input type="checkbox"/>	<input type="checkbox"/>			d	3	
L07	<input type="checkbox"/>	<input type="checkbox"/>			d		

### Planning Calendars View - Default Profile Measures

The Planning Calendars View contains the following measures.

#### Plc. Enable

The Plc. Enable is an editable measure to enable or disable a planning calendar. Each row (or list) represents a different planning calendar.

#### Plc. Valid

The Plc. Valid is a calculated measure that indicates if the set up of the planning calendar is valid or not. IPOCS-Lifecycle Allocation and Replenishment assumes that a planning calendar valid if it is enabled.

#### Plc. Desc

The Plc. Desc is a calculated measure used to indicate the planning calendar description. The description is calculated based on the planning calendar user-defined description and the planning calendar set up. The pattern applied is the following:

**[Plc. User Desc]+ +[List of selected Review Days separated by .]**

#### Plc. User Desc

The Plc. User Desc is an editable measure to input a user-defined planning calendar description. The final planning calendar description takes into consideration the user-defined description. The entered value must not contain a colon punctuation mark (:).

#### Plc. Horizon Dur (d)

The Plc. Horizon Dur (d) is an editable measure to input the time horizon for the planning calendar. The time horizon is a numeric value expressed in a number of days.

#### Rule Plc. Count

The Rule Plc. Count is a calculated measure to display the total number of rules that are using the planning calendar.

#### PL Plc. Count

The PL Plc. Count is a calculated measure to display the total number of product and location combinations that associated with the planning calendar.

#### PL Plc. %

The PL Plc. % is a calculated measure used to indicate, in percentage, how much the product and location combinations associated with the planning calendar represent the total of product and location combinations with a lifecycle phase value. The value of this measure is the result of the formula:

#### Figure 19-17 Calculation

$$100 * \frac{PL\ Plc.\ Count}{All\ PL\ Count}$$

#### Daily Ex. Copy & Paste

The Daily Ex. Copy & Paste is an editable measure to select whether the planning calendar is the source or destination for the copy/paste exception functionality (**Copy-Paste Exceptions** action button). Valid values are:

- **Copy**  
The option selected in the planning calendar used as a source of the copy for the daily exception. The copy copies all information in the view Daily Exceptions.
- **Paste**  
The option selected in the planning calendar used as a destination of the copy for the daily exception. The paste overrides all the information in the view Daily Exceptions.
- -  
The option selected to clear the measure. An example of this would be to select a copy of the planning calendar 01 and then select paste to the planning calendar 02. Then when the **Copy-Paste Exception** action button runs all daily exceptions from Planning Calendar 01, it is copied to Planning Calendar 02. The results can be selected in the view Daily Exceptions.



#### Note:

Only one planning calendar should be selected as a source (**Copy**) but multiple planning calendar can be selected as a destination (**Paste**).

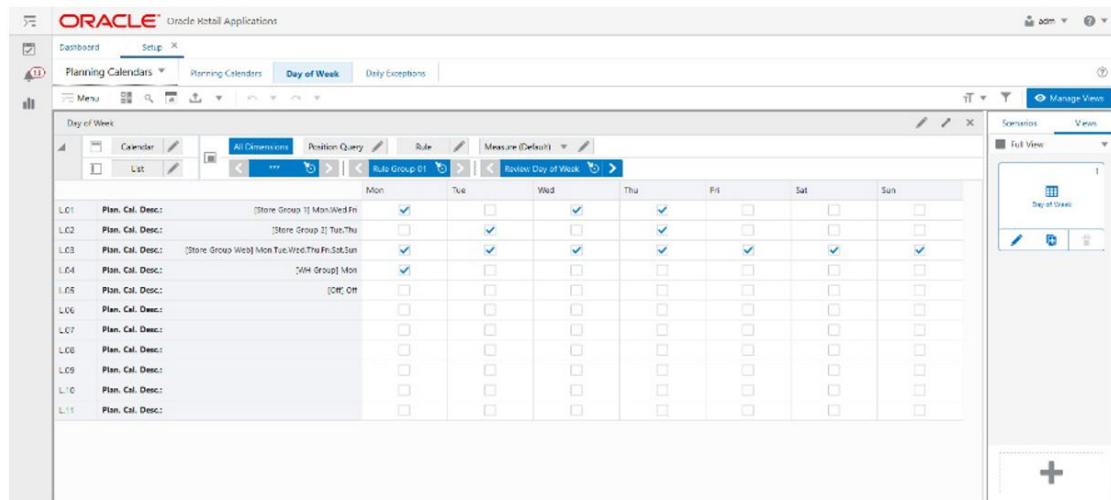
#### Plc. User Filter

The Plc. User Filter is an editable measure to select the planning calendar to filter the views by the selected planning calendar. This measure is used by the **Run Filter** action button responsible to calculate the filters applied to the views within the Supply Chain Network workspace.

## Day of Week View

The **Day of Week View**, under the **Day of Week tab**, allows you to set up what the week must be in terms of the review and receipt days for the planning calendar. This set up is also used by IPOCS-Lifecycle Allocation and Replenishment Engine to know what the next review day is, or what the next receipt day is.

**Figure 19-18 Day of Week View**



### Day of Week View - Default Profile Measures

The Day of Week View contains the following measures.

#### Review Day of Week

This is an editable measure to select the days of the week, in the planning calendar, to be used for the replenishment days.

#### Receipt Day of Week

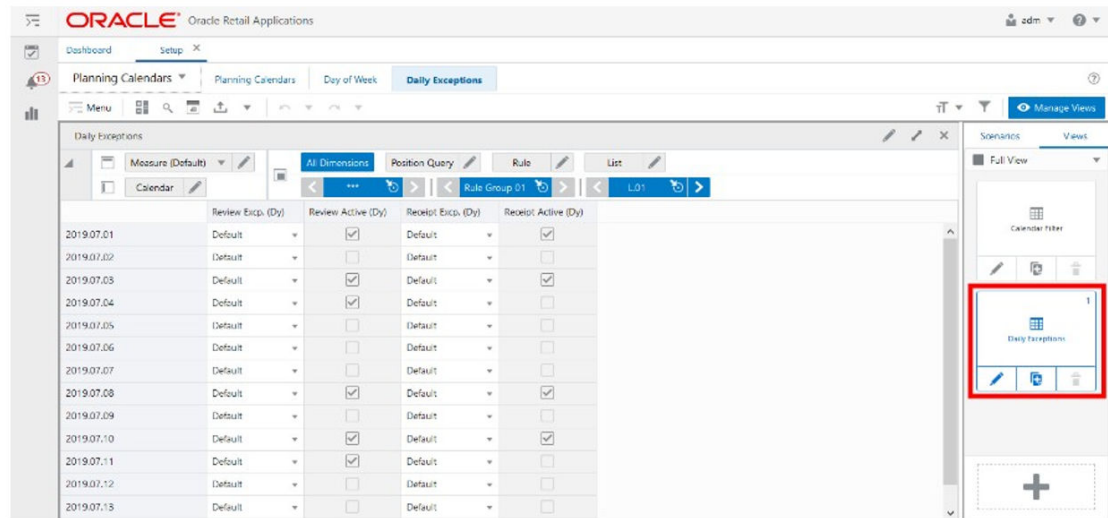
This is an editable measure to select the days of the week, in the planning calendar, to be used as received deliveries days.

## Daily Exceptions View

The **Daily Exceptions View**, under the **Daily Exceptions tab**, allows you to set up exception days on top of the set up already completed for the days of week. For example, if Fridays are selected as review days but there is a specific Friday where the review can not be completed, then you can use this view to override the particular Friday date to be a no-review day. By default, all dates assume the set up from the Day of Week view.



**Figure 19-19 Daily Exceptions View**



### Daily Exceptions View - Default Profile Measures

The Daily Exceptions View contains the following measures.

#### Review Excp. (Dy)

The Review Exception (Day) is an editable measure to set up a review day exception, in the planning calendar, for a particular date. Valid values are:

- **Default**  
This option assumes the review day set up from the Day of Week view.
- **On**  
This option overrides the review day set up from the Day of Week and forces the date to be a review day.
- **Off**  
This option overrides the review day set up from the Day of Week and forces the date to be a no-review day.

#### Review Active (Dy)

The Review Active (Day) is a calculate measure used to indicate whether the date is a review day or not (might be a forced exception or the default day from the Day of Week view). When selected, the date is a review day. When clear, the date is not a review day.

#### Receipt Excp. (Dy)

The Receipt Exception (Day) is an editable measure to set up a receipt day exception, in the planning calendar, for a particular date. Valid values are:

- **Default**  
This option assumes the receipt day set up from the Day of Week view.
- **On**  
This option overrides the receipt day set up from the Day of Week and forces the date to be a receipt day.

- **Off**

This option overrides the receipt day set up from the Day of Week and forces the date to be a no-receipt day.

- **Review Active (Dy)**

The Review Active (Day) is a calculated measure used to indicate whether the date is a receipt day or not (might be a forced exception or the default day from the Day of Week view). When selected the date is a receipt day. When clear, the date is not a receipt day.

## Lifecycle Calendars Step

This step contains these views:

- [Lifecycle Calendars View](#)
- [Lifecycle Phases View](#)

In IPOCS-Lifecycle Allocation and Replenishment the Lifecycle represents all the phases that every item goes through during its lifetime. A full lifecycle is when an item goes from discovery to maturity and then end of life.

**Figure 19-20 IPOCS-Lifecycle Allocation and Replenishment Lifecycle Illustration**



The IPOCS-Lifecycle Allocation and Replenishment Lifecycle calendar defines the timing of the lifecycle phases, and it is linked to an item assortment plan at the location. The assortment start date is used as an Anchor Date to trigger the start of the lifecycle assortment. The end date defines when an item should stop selling and stop being replenished.

The IPOCS-Lifecycle Allocation and Replenishment approaches for replenishment may vary throughout the different lifecycle phases:

- **Discovery**

This rule measures how long the sales forecast takes to stabilize during the initial sales period. Sales are generally highly volatile.

- Example: Setting 3-4 weeks after (end of) initial allocation or 2% Sell Through of Total Initial Inventory
- Setting the end of Discovery too early could misdiagnose poor sales for an item
- Setting the end of Discovery too early could misdiagnose poor sales for an item

- **Maturity**

Item sales growth is continuous and forecasting in general is less volatile and more reliable.

- **End of Life**

The item is close to the planned assortment end date and typically sales begin to diminish. In some cases, the item is sold at a Clearance Price during the end of life.

- Example: Set as 80% Sell Through of Total Initial Inventory or for a specific date
- The total forecast from the beginning of the end of life to the assortment end date is the key driver for replenishment for this phase of the lifecycle

The end of replenishment may be linked to the Assortment End Date, to a user-defined end of replenishment date or calculated by the system based on an elapsed time starting from the anchor date.

## Lifecycle Calendars View

The **Lifecycle Calendars View**, under the **Lifecycle Calendars tab**, allows you to set up a lifecycle calendar where the start and end dates and the number of phases are specified. The Phases setup is completed in the Lifecycle Phases view.

**Figure 19-21 Lifecycle Calendars View**

	Lfc. Enable	Lfc. Valid	Lfc. Desc	Lfc. User Desc	Lfc. Anchor	Lfc. Default Anchor Date	Lfc. End	Lfc. Default E Date
L01	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Warehouses] -inf -> +inf	Warehouses	Default		Def. Date	
L02	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Stores] Ast. Start -> Ast. End	Stores	Ast. Start		Ast. End	
L03	<input type="checkbox"/>	<input type="checkbox"/>			Ast. Start		Ast. End	
L04	<input type="checkbox"/>	<input type="checkbox"/>			Ast. Start		Ast. End	
L05	<input type="checkbox"/>	<input type="checkbox"/>			Ast. Start		Ast. End	
L06	<input type="checkbox"/>	<input type="checkbox"/>			Ast. Start		Ast. End	
L07	<input type="checkbox"/>	<input type="checkbox"/>			Ast. Start		Ast. End	
L08	<input type="checkbox"/>	<input type="checkbox"/>			Ast. Start		Ast. End	
L09	<input type="checkbox"/>	<input type="checkbox"/>			Ast. Start		Ast. End	
L10	<input type="checkbox"/>	<input type="checkbox"/>			Ast. Start		Ast. End	
L11	<input type="checkbox"/>	<input type="checkbox"/>			Ast. Start		Ast. End	
L12	<input type="checkbox"/>	<input type="checkbox"/>			Ast. Start		Ast. End	

### Lifecycle Calendars View - Default Profile Measures

The Lifecycle Calendars View contains the following measures.

#### Lfc. Enable

The Lifecycle Enable is an editable measure to enable or disable a lifecycle calendar. Each row (or list) represents a different lifecycle calendar.

#### Lfc. Valid

The Lifecycle Valid is a calculated measure used to indicate if the set up of the lifecycle calendar is valid or not. IPOCS-Lifecycle Allocation and Replenishment assumes a lifecycle calendar is valid if the total number of phases for the lifecycle calendar has a valid set up in the Lifecycle Phases view. For example, if a lifecycle calendar is set up to have four phases and only three of them are valid, then the lifecycle calendar is not valid. The lifecycle calendar is only valid when all four out of the four of four phases are valid.

#### Lfc. Desc

The Lifecycle Description is a calculated measure used to indicate the lifecycle calendar description. The description is calculated based on the lifecycle calendar user-defined description and the lifecycle calendar set up. The pattern applied is the following:

**[Lfc. User Desc]+ + #START# + -> + #END#**, where:

- **#START#** value is as follows
  - If the measure Lfc. Anchor is set to assortment start date then it is the text Ast. Start.
  - If the measure Lfc. Anchor is set to Default and the anchor date exists (measure Lfc. Default Anchor Date is not empty) then it is the date indicated in the measure Lfc. Default Anchor Date.
  - If the measure Lfc. Anchor is set to Default and the anchor date does not exist (measure Lfc. Default Anchor Date is empty) then it is the text -inf (infinite).
- **#END#** value is as follows
  - If the measure Lfc. End is set to assortment start date then it is the text Ast. End.
  - If the measure Lfc. End is set to Default Date and the default end date exist (measure Lfc. Default End Date is not empty) then it is the date indicated in the measure Lfc. Default End Date.
  - If the measure Lfc. End is set to Default Date and the default end date does not exist (measure Lfc. Default End Date is empty) then it is the text +inf (infinite).
  - If the measure Lfc. End is set to Default then it is the value indicated in the measure Lfc. Default End Dur (d).

#### **Lfc. User Desc**

The Lifecycle User Description is an editable measure to input a user-defined lifecycle calendar description. The final lifecycle calendar description takes into consideration the user-defined description. The entered value must not contain a colon punctuation mark (:).

#### **Lfc. Anchor Method**

The Lifecycle Anchor Method is an editable measure to select how IPOCS-Lifecycle Allocation and Replenishment should calculate the lifecycle calendar start date. Valid values are:

- **Default**

This option sets the lifecycle calendar start date to the date indicated in the measure Lfc. Default Anchor Date. If the measure Lfc. Default Anchor Date is empty, then the start date is assumed as  $-\infty$  (infinite).
- **Ast. Start**

This option sets the lifecycle calendar start date to the same date as the assortment start date.

#### **Lfc. Default Anchor Date**

The Lifecycle Default Anchor Date is an editable measure to define a default start date for the lifecycle calendar when the Lfc. Anchor measure is set up as default.

#### **Lfc. End Method**

The Lifecycle End Method is an editable measure to select how IPOCS-Lifecycle Allocation and Replenishment should calculate the lifecycle calendar end date. Valid values are:

- **Def. Date**

This option sets the lifecycle calendar end date to the date indicated in the measure Lfc. Default End Date. If the measure Lfc. End Anchor Date is empty then the end date is assumed as  $-\infty$  (infinite).

- **Def. Dur.**

This option sets the lifecycle calendar end date to the lifecycle start date plus the number of days indicated in the measure Lfc. Default End Dur (d). If the measure Lfc. Default End Dur (d) is empty then 0 days is assumed.

- **Ast. End**

This option sets the lifecycle calendar end date to the same date as the assortment end date.

### **Lfc. Default End Date**

The Lifecycle Default End Date is an editable measure to define a default end date for the lifecycle calendar when the Lfc. End measure is set up as Def. Date.

### **Lfc. Default End Dur (d)**

The Lifecycle Default End Duration (day) is an editable measure to defined default duration in days for the lifecycle calendar when the Lfc. End measure is set up as Def. Dur.

### **Lfc. Number of Phases**

The Lifecycle Number of Phases is an editable measure to define how many phases the lifecycle calendar has. The number of phases indicated in this measure is the number of rows (phases) available in the view Lifecycle Phases to set up the phases.

### **Rule Lfc. Count**

The Rule Lifecycle Count is a calculated measure to display the total number of rules that are using the lifecycle calendar.

### **PL Lfc. Count**

Product and Location Lifecycle Count is a calculated measure to display the total number of product and location combinations that are associated with the lifecycle calendar.

### **PL Lfc. %**

The Product and Location Lifecycle Percentage is a calculated measure used to indicate, in percentages, how many product and location combinations associated with the lifecycle calendar are represented in the total of product and location combinations with a lifecycle phase value. The value of this measure is the result of the formula:

### **Figure 19-22 Calculation**

$$100 * \frac{PL\ Lfc.\ Count}{All\ PL\ Count}$$

### **Lfc Duplicate Phases**

The Lifecycle Duplicate Phases is an editable measure to select whether the lifecycle calendar is the source or destination for the copy/paste lifecycle functionality (**Copy-Paste LFC** action button). Valid values are:

- **Copy**  
The option selected in the lifecycle calendar to be used as the source of the copy.
- **Paste**  
The option selected in the planning calendar to be used as destination of the copy.
- -  
The empty option selected to clear the measure.



**Note:**

Only one lifecycle calendar should be selected as a source (**Copy**) but multiple lifecycle calendars can be selected as a destination (**Paste**).

**Lfc. User Filter**

The Lifecycle User Filter is an editable measure to select the lifecycle calendar to filter the views by the selected lifecycle calendar. This measure is used by the **Run Filter** action button responsible to calculate the filters applied to the views within the Supply Chain Network workspace.

## Lifecycle Phases View

The **Lifecycle Phases View**, under the **Lifecycle Phases tab**, allows you to configure each one of the phases for the total of phases specified in the lifecycle calendar. In this view, you can name the phases and set up the start and duration of each phase.

The lifecycle phases are considered as Prod-Loc Attributes in IPOCS-Lifecycle Allocation and Replenishment that can be used to set up replenishment parameter rules based on lifecycle phases.

This allows the IPOCS-Lifecycle Allocation and Replenishment to work on associating the correct replenishment parameters down to the item-location level (lowest level) based on the lifecycle phase. Using lifecycle phases simplifies the replenishment parameter management by completing it at the lifecycle phase level.

Figure 19-23 Lifecycle Phases View

Phase Valid	Phase	Phase Start	Phase Anchor Offset	Phase End Offset (d)	Phase Start Date	Phase Min Sales %
<input checked="" type="checkbox"/>	Init	Offset vs. Anchor	31d	0d		%
<input checked="" type="checkbox"/>	Dis	Offset vs. Anchor	0d	0d		%
<input checked="" type="checkbox"/>	Mat	Offset vs. Anchor	21d	0d		%
<input checked="" type="checkbox"/>	EoL	Offset vs. End	0d	-21d		%

### Lifecycle Phases View - Default Profile Measures

The Lifecycle Phases View contains the following measures.

#### Phase Valid

The Phase Valid is a calculated measure used to indicate if the set up of the lifecycle phase is valid or not. IPOCS-Lifecycle Allocation and Replenishment assumes a lifecycle phase is valid when the Phase and Phase Start measures are populated.

#### Phase

The Phase is an editable measure to input a user-defined lifecycle phase description or name.

#### Phase Start Method

The Phase Start Method is an editable measure to select how the IPOCS-Lifecycle Allocation and Replenishment calculates the phase start date. Valid options are:

- **Offset versus Anchor**

In this option the phase start date is calculated based on the lifecycle start date plus the number of days indicated in the measure Phase Anchor Offset (d).

- **Offset versus End**

In this option the phase start date is calculated based on the lifecycle end date plus the number of days indicated in the measure Phase End Offset (d).

- **Date**

In this option the phase start date is set to the date indicated in the measure Phase Start Date.

- **Seas. Sales %**

In this option the phase starts on the date that the sales reached the percentage indicated in the measure Phase Min Sales %.

- **First**

In this option the phase starts first before all other phases in the lifecycle calendar. Based on the previously listed options, the lifecycle phase is assigned to the item and location combination when the IPOCS-Lifecycle Allocation and Replenishment system date reaches the start date assigned to the phase.

**Phase Anchor Offset (d)**

The Phase Anchor Offset (day) is an editable measure to define the number of days to offset from the lifecycle calendar start date. This value is only used when the Phase Start is set to Offset vs Anchor. Negative values can also be used if the offset days need to be moved backward to the past.

**Phase End Offset (d)**

The Phase End Offset (day) is an editable measure to define the number of days to offset from the lifecycle calendar end date. This value is only used when the Phase Start is set to Offset versus End. Negative values can also be used if the offset days need to be moved backward to the past.

**Phase Start Date**

The Phase Start Date is an editable measure for you define a specific date to start the lifecycle phase. This value is only used when the Phase Start is set to Date.

**Phase Min Sales %**

The Phase Min Sales % is an editable measure to define the minimum sales percentage that IPOCS-Lifecycle Allocation and Replenishment uses to identify the lifecycle phase start date. This value is only used when the Phase Start is set to Seas. Sales %.

## Rules Step

This step contains these views:

- [Rules View](#)
- [Conditions View](#)
- [SKU-LOC View](#)
- [SKU-LOC-Phases View](#)
- [SKU-LOC-Week View](#)

**IPOCS-Lifecycle Allocation and Replenishment Rules Concept for the Supply Chain Network Task**

IPOCS-Lifecycle Allocation and Replenishment provides a powerful engine that enables you to create a set of rules to apply all set up completed, within the Setup Task (BOD, Planning Calendar, and lifecycle calendar), down to the item and location levels. You can define multiple rules at a higher level using product, location and product-location attributes and then allow the IPOCS-Lifecycle Allocation and Replenishment Rule Engine to calculate at the lowest level, product and location combinations, and define the correct set up to be applied.

IPOCS-Lifecycle Allocation and Replenishment rules allows you to specify the period when the rule should be applied (if applicable) and the rules' priority. The rule priority allows IPOCS-Lifecycle Allocation and Replenishment to choose the correct rule to be applied if a product and location combination fits in more than one set up rule (the higher the number, the higher the priority). The rule start and end date are used by IPOCS-Lifecycle Allocation and Replenishment to determine if the rule should be considered or discarded. If the IPOCS-



Lifecycle Allocation and Replenishment system date falls within the start date and end date (or rule dates are empty) then it is considered. Otherwise, it is discarded.

Following are two examples and illustrations of rules for the set up task:

- **Rule 1**

This rule should be configured to apply the Bill of distribution BOD1, the planning calendar PLC1 and the lifecycle calendar Clnd1.

- The scope of the rule is the scope of the rule group where it is being configured (for example, Apple Handset products and the country UK).
- The condition where the rule applies is for all items in the scope and for all locations which type is STORE.

- **Rule 2**

This rule should be configured to apply the Bill of distribution BOD2, the planning calendar PLC2 and the lifecycle calendar Clnd2.

- The scope of the rule is the scope of the rule group where it is being configured (for example, Apple Handset products and the country UK).
- The condition where the rule applies is for all items in the scope and for all locations where the type is STORE.



**Note:**

The condition is used by the IPOCS-Lifecycle Allocation and Replenishment Rule Engine to apply the set up to the product and location combinations that match the condition within the rule scope. The rule scope is defined by the Product Groups and Location Groups associated with the rule's rule group.

**Figure 19-24 Illustration for Rule 1**

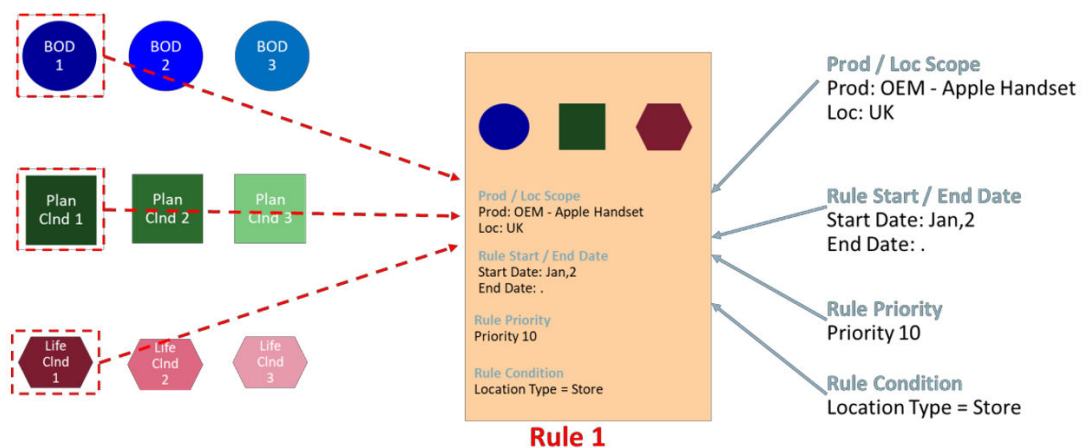
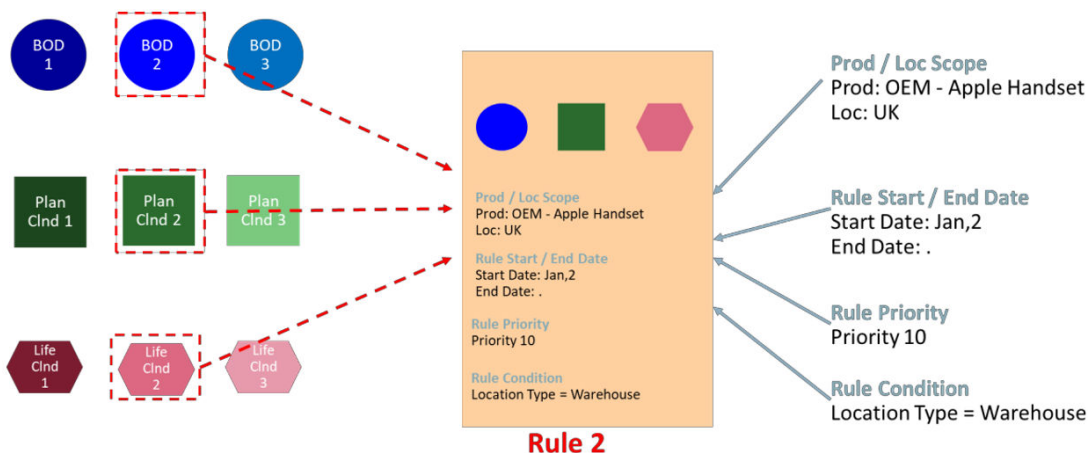


Figure 19-25 Illustration for Rule 2



## Rules View

The **Rules View**, under the **Rules tab**, allows you to configure the rules by enabling them and defining the rule start date, end date and priority for each one. Once configured you can set up the rule by selecting the bill of distribution, the planning calendar, and the lifecycle calendar that the rule uses. The product and locations that apply the rule set up are based on the scope of the rule's rule group (Product Scope and Location Scope views) and the rule's condition that is set up and managed in the Conditions view.

Figure 19-26 Rules View

Rule ID	Rule User Filter	Rule Enable	Rule Level	Rule Condition	Rule Start Date	Rule End Date	Rule Priority	Bulk
R01.01		<input checked="" type="checkbox"/>	Local	[LDC == Store Group 01]			1.00	
R01.02		<input checked="" type="checkbox"/>	Local	[LDS == Store Group 02] AND [LCL != Store 01.0]			1.00	
R01.03		<input checked="" type="checkbox"/>	Local	[LDS == Store Group West]			1.00	
R01.04		<input checked="" type="checkbox"/>	Local	[LCL == Reg. DC]			1.00	
R01.05		<input checked="" type="checkbox"/>	Local	[LCL == Warehouse]			1.00	
R01.06		<input checked="" type="checkbox"/>	Local	[LCL == WH Blvd 1 OR == WH Blvd 2 OR == Superline]			1.00	
R01.07		<input type="checkbox"/>	Local	[LDS == Store Group 01] AND [POS == SKU 0002]	01/01/2019	01/02/2019	3.00	
R01.08		<input type="checkbox"/>	Local	[LDS == Store Group West] AND [POS == SKU 0002]	07/01/2019	07/20/2019	3.00	
R01.09		<input type="checkbox"/>	Local	[LDC == Franchise Group] AND [POS == SKU 0002]	07/01/2019	07/02/2019	3.00	
R01.10		<input type="checkbox"/>	Local	[LCL == Warehouse NEW 01]			2.00	
R01.11		<input checked="" type="checkbox"/>	Local	[LDS == Store Group 01] AND [POS == Subclass 01]			2.00	
R01.12		<input type="checkbox"/>	Local	[LCL == Suspilar New 01 OR == Suspilar New 02 OR == Suspilar New 03]			1.00	
R01.13		<input type="checkbox"/>	Local	[LCL == Warehouse] AND [POS == SAC 0006]			2.00	
R01.14		<input type="checkbox"/>	Local	[LCL == Store 01.0]	01/01/2019	10/20/2019	3.00	
R01.15		<input type="checkbox"/>	Local	[LCL == Store 02.0]			4.00	
R01.16		<input type="checkbox"/>	Local	[LDC == Store Group 01] AND [POS == Subclass 01]	07/01/2019	07/02/2019	5.00	

### Rules View - Measure Profiles

The Rules View contains the following profiles to change the measures that are visible in the view:

- **Default**

This profile is used as default by the view. All the available or visible measures are listed and described in the section Measure: Default Profile.
- **BOD**

This profile displays a subset of measures from the default profile. It focuses on the rule and on the BOD measures only. The Planning Calendar and Lifecycle calendar-related measures are left out of the visible measures.
- **Calendars**

This profile displays a subset of measures from the default profile. It focuses on the rule and in the Planning Calendar measures only. BOD and Lifecycle calendar-related measures are left out of the visible measures.
- **Lifecycle**

This profile displays a subset of measures from the default profile. It focuses on the rule and on the lifecycle calendar only. The BOD and Planning calendar-related measures are left out of the visible measures.

### Rules View - Default Profile Measures

The Rules View contains the following measures.

#### Rule User Filter

The Rule User Filter is an editable measure to select the rule to filter the views by the selected rule. This measure is used by the **Run Filter** action button responsible to calculate the filters applied to the views within the Supply Chain Network workspace.

#### Rule Enable

The Rule Enable is an editable measure to enable or disable a rule. Each row (or list) represents a different rule.

#### Rule Condition

The Rule Condition is a calculated measure used to indicate the condition for which the rule is valid. The condition is the result of the set up completed in the Conditions view.

#### Rule Start Date

The Rule Start Date is an editable measure for you define a start date for the rule (when the rule should become active). When the rule is valid and the start date is empty, then IPOCS-Lifecycle Allocation and Replenishment applies it. When the rule is valid, and the start date is populated, IPOCS-Lifecycle Allocation and Replenishment starts to apply it only when the start date is reached.

#### Rule End Date

The Rule End Date is an editable measure for you define an end date for the rule (when the rule should become inactive). When empty IPOCS-Lifecycle Allocation and Replenishment assumes that the rule has no end date and if it is valid then IPOCS-Lifecycle Allocation and Replenishment applies it. When the rule is valid, and the end date is populated, IPOCS-Lifecycle Allocation and Replenishment stops applying it starting from the defined date.

#### Rule Priority

The Rule Priority is an editable measure for you define the rule's priority. The higher that the number is, then the higher the priority of the rule. This rule priority is important to IPOCS-

Lifecycle Allocation and Replenishment as it is used when rules overlap each other. IPOCS-Lifecycle Allocation and Replenishment uses the rule priority to select which one to apply.

**Rule Valid**

The Rule Valid is a calculated measure used to indicate if the set up of the rule is valid or not. For example, if the BOD, Planning Calendar, and Lifecycle Calendar are missing then the rule is not valid for IPOCS-Lifecycle Allocation and Replenishment. IPOCS-Lifecycle Allocation and Replenishment needs at least one of them to be assigned for the rule to be considered valid.

**PL Ass. Count**

The Product and Location Associated Count is a calculated measure to display the total number of product and location combinations that are associated with the rule based on the rule's condition.

**PL Ass. %**

The Product and Location Associated Percentage is a calculated measure used to indicate, in percentage, how much the product and location combinations, where the rule is applicable, represent the total of product and location combinations within the rule group scope. The value of this measure is the result of the formula:

**Figure 19-27 Calculation**

$$100 * \frac{PL\ Ass.\ Count}{All\ PL\ Count}$$

**Rule BOD**

The Rule Bill of Distributions is an editable measure to select the bill of distribution to be applied by the rule. This measure is a picklist populated with all valid BODs that were set up in the Bill of Distributions view.

**PL BOD App. Count**

The Product and Location Bill of Distributions Applied Count is a calculated measure to display the total number of product and location combinations that apply this rule's BOD. The calculations take into account all the valid rules where the product and location combinations fall into and based on the priority calculates the count of product and location that applies the selected BOD.

**PL BOD App. %**

The Product and Location Bill of Distributions Applied Percentage is a calculated measure used to indicate, in percentage, how much the product and location combinations, where the rule's BOD is applicable, represent the total of product and location combinations within the rule group scope. The value of this measure is the result of the formula:

**Figure 19-28 Calculation**

$$100 * \frac{PL\ BOD\ App.\ Count}{All\ PL\ Count}$$

**Rule Plc.**

The Rule Planning Calendar is an editable measure to select the planning calendar to be applied by the rule. This measure is a picklist populated with all valid planning calendars that were set up in the Planning Calendars view.

**PL Plc. App. Count**

The PL Planning Calendar Applied Count is a calculated measure to display the total number of product and location combinations that apply this rule's planning calendar. The calculations take into account all the valid rules where the product and location combinations fall into and based on the priority calculates the count of product and location that apply to the selected planning calendar.

**PL Plc. App. %**

The PL Planning Calendar Applied Percentage is a calculated measure used to indicate, in percentage, how much the product and location combinations, where the rule's planning calendar is applicable, represent the total of product and location combinations within the rule group scope. The value of this measure is the result of the formula:

**Figure 19-29 Calculation**

$$100 * \frac{PL\ Plc.\ App.\ Count}{All\ PL\ Count}$$

**Rule Lfc.**

The Rule Lifecycle Calendar is an editable measure to select the lifecycle calendar to be applied by the rule. This measure is a picklist populated with all valid lifecycle calendars that were set up in the Lifecycle Calendars view.

**PL Lfc. App. Count**

The Product and Location Lifecycle Calendar Applied Count is a calculated measure to display the total number of product and location combinations that apply this rule's lifecycle calendar. The calculations take into account all the valid rules where the product and location combinations fall into and based on the priority calculates the count of product and location that apply to the selected lifecycle calendar.

**PL Lfc. App. %**

The Product and Location Lifecycle Calendar Applied Percentage is a calculated measure used to indicate, in percentage, how many of the product and location combinations, where the rule's lifecycle calendar is applicable, represent the total of product and location combinations within the rule group scope. The value of this measure is the result of the formula:

**Figure 19-30 Calculation**

$$100 * \frac{PL\ Lfc.\ App.\ Count}{All\ PL\ Count}$$

**Copy and Paste**

The Copy and Paste is an editable measure to select whether the rule is the source or destination for the copy and paste rules functionality (**Copy-Paste Rules** action button). Valid values are:

- **Copy**  
Option to select in the rule to be used as the source of the copy.
- **Paste**  
Option to select in the rule to be used as the destination of the copy.
- -  
Option selected to clear the measure.

 **Note:**

Only one rule should be selected as a source ( **Copy**) but multiple rules can be selected as a destination ( **Paste**).

## Conditions View

This view allows you to define the conditions for the rules based in product, location, and product-location attributes. A rule condition is what allows the engine to find the product and location combinations where the rule is applicable.

**Figure 19-31 Conditions View**

Measure	Cond Attribute	Within Cond Op	Cond Value	Cond Value String	Cond Value Measure	Cond Value Date	Between Cond Op	Cond Order	Cond Group	Validation Result	Invalid Flag	Valid Flag
condition 01	Department	==	0.00	Missy			AND	1	1	(dept == missy and	<input type="checkbox"/>	<input checked="" type="checkbox"/>
condition 02	Class	!=	0.00	Missy Sweaters				2	1	cls != missy_sweaters)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
condition 03			0.00					3	1		<input type="checkbox"/>	<input type="checkbox"/>
condition 04			0.00					4	1		<input type="checkbox"/>	<input type="checkbox"/>

### Conditions View - Default Profile Measures

The Conditions view contains the following measures.

#### Condition Attribute

The Condition Attribute measure allows you to select the attribute for the condition, The attributes for the rules are assigned in the Attribute Review workspace.

#### Within Cond Op

The Within Cond Op measure allows you to specify the operator to be used inside the condition.

**Table 19-2 Within Cond Op Measure Available Operators**

Possible Operators	Descriptions	Example
==	Checks if the attribute value is equal with the Condition Value	brand == Private Label
!=	Checks if the attribute value is different from the Condition Value	average sales != 0
>	Checks if the attribute value is larger than the Condition Value	Average sales >5
>=	Checks if the attribute value is larger or equal to the Condition Value	
<	Checks if the attribute value is less than the Condition Value	Standard deviation of sales <6
<=	Checks if the attribute value is less or equal to the Condition Value	
contain		
not contain		
match		
not match		

**Cond Value**

The Cond Value measure is used when the type of the attribute is numeric. Example: average sales > 10

**Cond Value String**

The Cond Value String measure is used when the type of the attribute is a string. Example: brand == Private Label

**Cond Value Measure**

The value of the Cond Value measure is a measure name, which is populated by an expression that let's you refine the condition value. For instance private label versus non-private label.

This measure is used when you want to refine the condition value.

For instance, for the coffee items, except Private Label, you want to assign items to the rule that sell more than 50 per week. For Private Label items you may want the value to be 100. You need to populate your Condition measure with a value of 100 for all Private Label items, and the rest of the coffee items with 50.

**Cond Value Date**

The Cond Value Date measure is used when the type of the attribute is a date. Example: today >= 02/30/2024"

**Between Cond Op**

Within a rule there can be multiple conditions and also multiple condition groups. This is specified in the Cond Group measure. Conditions with the same Cond Group value belong to the same group.

For example, if a rule has 4 conditions, Conditions 1 and 2 can belong to condition group 1, and conditions 3 and 4 can belong to the condition group 2. Also, the Cond Order measure gives the ranking of the conditions inside the group.

The following table is an assumed use case:

**Table 19-3 Between Cond Op Assumed Use Case**

Condition	Between Con Op	Cond Order	Cond Group
Condition 1	AND	1	1
Condition 2	OR	2	1
Condition 3	OR	3	2
Condition 4		4	2

The value for the Between Cond Op can be the logical operators AND or OR.

The conditions are evaluated first inside a condition group and then between groups. In the previous case, the resulting condition is:

(Condition 1 **AND** Condition 2) **OR** (Condition 3 **OR** Condition 4)

Here is an example where all conditions belong to the same condition group:

**Table 19-4 Example: All Conditions Belong to the Same Condition Group**

Condition	Between Con Op	Cond Order	Cond Group
Condition 1	AND	1	1
Condition 2	OR	2	1
Condition 3	OR	3	1
Condition 4		4	1

The resulting condition for the rule is given by:

Condition 1 **AND** Condition 2 **OR** Condition 3 **OR** Condition 4

Note that the conditions are evaluated in the order given by the values in the Cond Order measure.

### Cond Order

The Cond Order measure displays the order in which conditions are evaluated, wither independently or inside a condition group.

### Cond Group

The Cond Group measure allows you to group conditions. This is useful when you want to evaluate conditions in a two-step process. First, the conditions are evaluated inside groups. In the second step, the group results are evaluated .

### Validation Result

The Validation Result measure displays the condition expressions that are validated.

### Invalid Flag

The Invalid Flag measure indicates if a condition is invalid.



## Valid Flag

The Valid Flag measure indicates if a condition is valid.

## SKU-LOC View

The **SKU-LOC View**, under the **SKU-LOC tab**, allows you to review the results of the IPOCS-Lifecycle Allocation and Replenishment Rule Engine calculation based on the rules set up in the workspace. In this view, you have to review to the results at the lowest level, item, and location levels, and you can also create exceptions, at the item-location level, to overwrite the replenishment set up calculated by the IPOCS-Lifecycle Allocation and Replenishment Rule Engine (for example, a particular item and location that should apply a different planning calendar from all the other item locations in the same rule).

**Figure 19-32 SKU-LOC View**

	PL User Filter	All PL	PL Valid	PL BOD	Ovr BOD	P
Store 001	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Store Group 1- New Warehouse] Warehouse NEW 01.1d.R1	-	-
Store 002	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Store Group 1- New Warehouse] Warehouse NEW 01.1d.R1	-	-
Store 003	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Store Group 1- New Warehouse] Warehouse NEW 01.1d.R1	-	-
Store 004	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Store Group 1- New Warehouse] Warehouse NEW 01.1d.R1	-	-
Store 005	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Store Group 2] Reg. DC.3d.R1	-	-
Store 006	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Store Group 2] Reg. DC.3d.R1	-	-
Store 007	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Store Group 2] Reg. DC.3d.R1	-	-
Store 008	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Store Group 2] Reg. DC.3d.R1	-	-
Store 009	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Store Group 1- New Warehouse] Warehouse NEW 01.1d.R1	-	-
Store 010	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Store Group 1- New Warehouse] Warehouse NEW 01.1d.R1	-	-
Store 011	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Store Group 1- New Warehouse] Warehouse NEW 01.1d.R1	-	-

## SKU-LOC View - Measure Profiles

The SKU-LOC View contains the following profiles to change the measures that are visible in the view:

- **Default**

This profile is used as default by the view. All the available or visible measures are listed and described in **SKU-LOC View - Default Profile Measures**.

- **BOD**

This profile displays a subset of measures from the default profile. It focuses on the rule and in the BOD measures only. Planning Calendar and Lifecycle calendar-related measures are left out of the visible measures.

- **Planning**

This profile displays a subset of measures from the default profile to focus on the Planning Calendar measures. BOD and Lifecycle calendar-related measures are left out of the visible measures.

- **Lifecycle**

This profile displays a subset of measures from the default profile. It focuses on the rule and in the lifecycle calendar only. BOD and Planning calendar-related measures are left out of the visible measures.

### **SKU-LOC View - Default Profile Measures**

The SKU-LOC View contains the following measures.

#### **PL User Filter**

The Product and Location User Filter is an editable measure to select the product and location combinations to filter the views by the selected product and location combinations. This measure is used by the **Run Filter** action button responsible to calculate the filters applied to the views within the Supply Chain Network workspace.

#### **All PL**

The All Product and Location is a calculated measure used to indicate if a product and location combination is valid or not. A selected measure indicates the combination is valid, meaning it has a lifecycle phase value. A clear measure indicates that it is not valid.

#### **PL Valid**

The Product and Location Valid is a calculated measure used to indicate if a product and location combination has a valid rule from where the IPOCS-Lifecycle Allocation and Replenishment Rule Engine calculates the replenishment set up. The measure is selected when the item and location combinations have at least one valid rule that applies. A clear measure indicates that it does not have at least one valid rule that applies.

#### **PL BOD**

The Product and Location Bill of Distribution is a calculated measure used to indicate that the bill of distribution is applied to the product and location combination. The bill of distribution displayed is the one calculated by the IPOCS-Lifecycle Allocation and Replenishment Rule Engine using the rules set up.

#### **Ovr BOD**

The Override Bill of Distributions is an editable measure that allows you to create exceptions at the item-location level. You can select the bill of distribution to override the assigned bill of distribution (measure PL BOD). This measure is a picklist populated with all valid BODs that were set up in the Bill of Distributions view.

#### **PL BOD Prio**

The Product and Location Bill of Distributions Priority is a calculated measure used to indicate the priority of the rule from where the bill of distribution was calculated for the product and location combination.

#### **PL BOD End Date**

The Product and Location Bill of Distributions End Date is a calculated measure used to indicate the end date of the rule from where the bill of distribution was calculated for the product and location combination.

#### **PL BOD Rule Count**

Product and Location Bill of Distributions Rule Count is a calculated measure used to indicate the total number of BOD that are assigned to the product and location combination based on the set up rules. Note that a product and location combination can only have one BOD active. The active one is the one from the rule with the highest priority or has an exception override.

**PL Plc.**

The Product and Location Planning Calendar is a calculated measure used to indicate the planning calendar applied to the product and location combination. The planning calendar displayed is the one calculated by the IPOCS-Lifecycle Allocation and Replenishment Rule Engine using the rules set up.

**Ovr Plc.**

The Override Planning Calendar is an editable measure that allows you to create exceptions at the item-location level. You can select the planning calendar to override the assigned planning calendar (measure PL Plc.). This measure is a picklist populated with all valid planning calendars that were set up in the Planning Calendars view.

**PL Plc. Prio**

The Product and Location Planning Calendar Priority is a calculated measure used to indicate the priority of the rule from where the planning calendar was calculated for the product and location combination.

**PL Plc. End Date**

Product and Location Planning Calendar End Date is a calculated measure used to indicate the end date of the rule from where the planning calendar was calculated for the product and location combination.

**PL Plc. Rule Count**

The Product and Location Planning Calendar Rule Count is a calculated measure used to indicate the total number of PLC that are assigned to the product and location combination based on the set up rules. Note that a product and location combination can only have one PLC active. The active one is the one from the rule with the highest priority or has an exception override.

**PL Lfc.**

The Product and Location Lifecycle Calendar is a calculated measure used to indicate the lifecycle calendar applied to the product and location combination. The lifecycle calendar displayed is the one calculated by the IPOCS-Lifecycle Allocation and Replenishment Rule Engine using the rules set up.

**Ovr Lfc.**

The Override Lifecycle Calendar. is an editable measure that allows you to create exceptions at the item-location level. You can select the lifecycle calendar to override the assigned lifecycle calendar (measure PL Lfc.). This measure is a picklist populated with all valid lifecycle calendars that were set up in the Lifecycle Calendars view.

**PL Lfc. Prio**

The Product and Location Lifecycle Calendar Priority is a calculated measure used to indicate the priority of the rule from where the lifecycle calendar was calculated for the product and location combination.

**PL Lfc. End Date**

The Product and Location Lifecycle Calendar End Date is a calculated measure used to indicate the end date of the rule from where the lifecycle calendar was calculated for the product and location combination.

**PL Lfc. Rule Count**

The Product and Location Lifecycle Calendar Rule Count is a calculated measure used to indicate the total number of lifecycle calendars that are assigned to the product and location combination based on the set up rules. Note that a product and location combination can only have one lifecycle calendar active. The active one is the one from the rule with the highest priority or has an exception override.

#### **Primary Source @ Today**

The Primary Source at Today is a calculated measure used to indicate the applied primary source for the product and location combination at the system date. The primary source is calculated from the current BOD assigned to the product and location combination.

#### **Lead Time @ Today Dur (d)**

The Lead Time at Today Duration (day) is a calculated measure used to indicate the applied lead time, in days, for the product and location combination at the system date. The lead time is calculated from the current BOD assigned to the product and location combination.

#### **Reserved Source 1 @ Today**

The Reserved Source 1 at Today is a calculated measure used to indicate the applied reserved source 1 for the product and location combination at the system date. The reserved source 1 is calculated from the current BOD assigned to the product and location combination.

#### **Reserved Source 2 @ Today**

The Reserved Source 2 at Today is a calculated measure used to indicate the applied reserved source 2 for the product and location combination at the system date. The reserved source 2 is calculated from the current BOD assigned to the product and location combination.

#### **Alternative Source @ Today**

The Alternative Source at Today is a calculated measure used to indicate the applied alternative source for the product and location combination at the system date. The alternative source is calculated from the current BOD assigned to the product and location combination.

#### **LLC @ Today**

The Low-level Code at Today is a calculated measure used to indicate the low-level code applied to the product and location combination at the system date. The low-level code is calculated from the current BOD assigned to the product and location combination and the valid values are:

- **0**: The location is a store
- **1**: The location is a warehouse
- **2**: The location is a supplier
- **-1**: The location is invalid

#### **Network Loop @ Today**

The Network Loop at Today is a calculated measure used to indicate if there are Network Loop errors caused by the BOD set up for the rule group at the system date. When selected, there are Network Loop errors. Otherwise, there are no errors.

#### **Revw @ Today**

The Review at Today is a calculated measure used to indicate if today (current system date) is a review day for the product and location combination. The review day is calculated from the current planning calendar assigned to the product and location combination.

#### **Next Revw @ Today Date**

The Next Review at Today Date is a calculated measure used to indicate the next review date for the product and location combination. The next review date is calculated from the current planning calendar assigned to the product and location combination.

**Next Revw @ Today Dur (d)**

The Next Review at Today Duration (day) is a calculated measure used to indicate the number of days to the next review date for the product and location combination. The calculation of the number of days uses the current system date and the Next Revw @ Today Date.

**Avg Revw Time @ Today Dur (d)**

The Average Review Time at Today Duration (day) is a calculated measure used to indicate the average number of days between each review period (planning period) for the product and location combination. The value is calculated using the review periods from the current planning calendar assigned to the product and location combination.

**Asst. Prod-Loc**

The Assorted Product and Location is a loaded measure used to indicate whether the product and location combinations are assorted or not.

**Asst. Prod-Loc Start Date**

The Assorted Product and Location Start Date is a loaded measure used to indicate the assortment start date for the assorted product and location combinations.

**Asst. Prod-Loc End Date**

The Assorted Product and Location End Date is a loaded measure used to indicate the assortment end date for the assorted product and location combinations.

**Asst. Prod-Loc Active**

Assorted Product and Location Active is a loaded measure used to indicate whether the product and location combinations are assorted and still active or not. If the assortment end date has not been reached yet then it is active. Otherwise, the product and location combination is assorted but not active.

**Lfc. Prod-Loc Def.**

The Lifecycle Calendar Product and Location Default is a loaded measure to identify whether the product and location combination has a valid lifecycle by default or not.

**Lfc. Prod-Loc Exc.**

The Lifecycle Calendar Product and Location Exception is a loaded measure used to indicate whether the lifecycle is an exception for the product and location combination. Check the measure Lfc. Prod-Loc Exc. in the Assortment Admin workspace for more detail on the valid values.

**Lfc. Prod-Loc Validity Start Date**

The Lifecycle Calendar Product and Location Validity Start Date is a loaded measure used to indicate the lifecycle start date exception for the product and location combination when there is an exception.

**Lfc. Prod-Loc Validity End Date**

The Lifecycle Calendar Product and Location Validity End Date is a loaded measure used to indicate the lifecycle end date exception for the product and location combination when there is an exception.

**Lfc. Prod-Loc**

The Lifecycle Calendar Product and Location is a loaded measure to identify whether the product and location combination has a valid lifecycle or not.

**Lfc. Anchor Exc. Date**

The Lifecycle Calendar Anchor Exception Date is a loaded measure to identify the lifecycle anchor date exception for the product and location combination when there is an exception.

**Lfc. End Exc. Date**

The Lifecycle Calendar End Exception Date is a loaded measure to identify the lifecycle's exception end date for the product and location combination when there is an exception.

**Actual Loc. Sales Units**

The Actual Location Sales Units is a loaded measure to display the actual sales for the product and location combination. The value displayed for the product and location combination is the aggregation of all the weeks that are in the scope of the workspace.

**Tot. Init. Fcst Units**

The Total Initial Forecast Units is a loaded measure to display the total initial forecast for the product and location combination. The value displayed for the product and location combination is the aggregation of all the weeks from the current week up to the forecast horizon.

**Lfc. Active @ Today**

The Lifecycle Calendar Active at Today is a loaded measure used to indicate whether the product and location combination has a valid lifecycle or not at the system date.

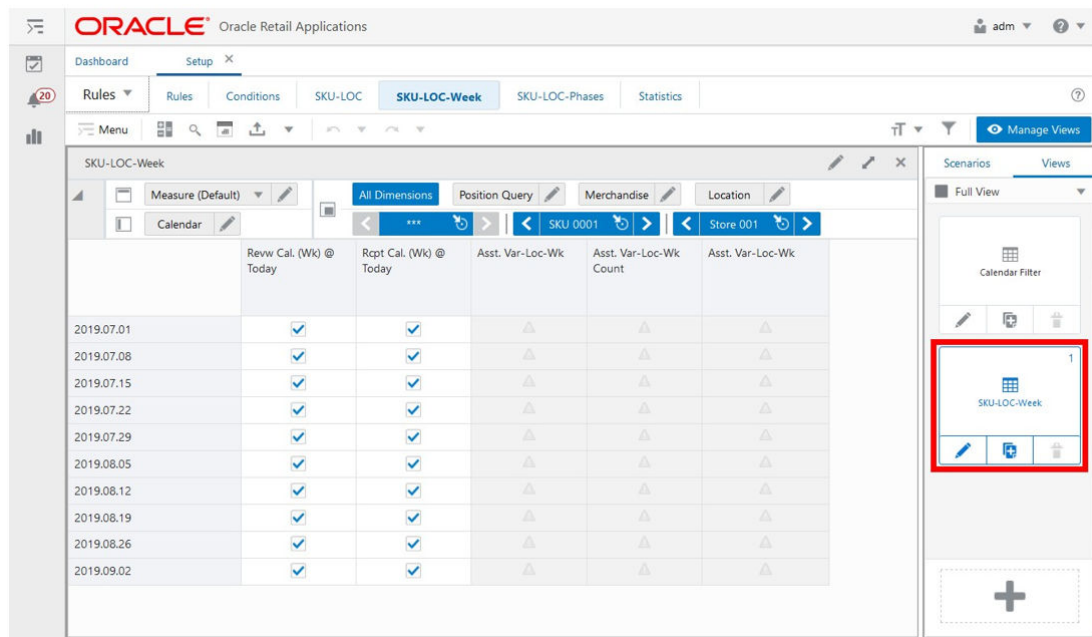
**Lfc. Active @ Today**

The Lifecycle Calendar Active at Today is a loaded measure used to indicate the lifecycle phase string for the product and location combination when the product and location combination has a valid lifecycle at the system date.

## SKU-LOC-Week View

The **SKU-LOC-Week View**, under the **Review tab**, allows you to review and overwrite the review weeks and receipt weeks. Any overrides are on top of the review weeks and receipt weeks that the IPOCS-Lifecycle Allocation and Replenishment calculates using the planning calendar set up for the product and location combination.

**Figure 19-33 SKU-LOC-Week View**



**SKU-LOC-Week View - Default Profile Measures**

The SKU-LOC-Week View contains the following measures.

**Revw Cal. (Wk) @ Today**

The Review Calendar (Week) at Today is an editable measure used to indicate whether the week is a review week or not based on the planning calendar set up for the product and location combination at the system date. You can override the calculated value.

**Rcpt Cal. (Wk) @ Today**

The Receipt Calendar (Week) at Today is an editable measure used to indicate whether the week is a receipt week or not based on the planning calendar set up for the product and location combination at the system date. You can override the calculated value.

**Asst. Var-Loc-Wk**

The Assorted Variant-Location-Week is a calculated measure used to indicate whether a Var-Location is assorted or not for the given week. (Note if one item under the Variant is assorted then this is indicated as true).

**Asst. Var-Loc-Wk Count**

The Assorted Variant-Location-Week Count is a calculated measure used to indicate whether a Var-Location is assorted or not for the given week. (Note if one item under the Variant is assorted then this is indicated as true).

**Asst. Var-Loc-Wk**

The Assorted Variant-Location-Week is an image measure that aligns with the Asst. Var-Loc-Wk Count.

 **Note:**

The location group measures display if the Location Group level (or higher) is available in the view. Otherwise, the measures display the following warning sign to inform you that the measure is not available at that level.

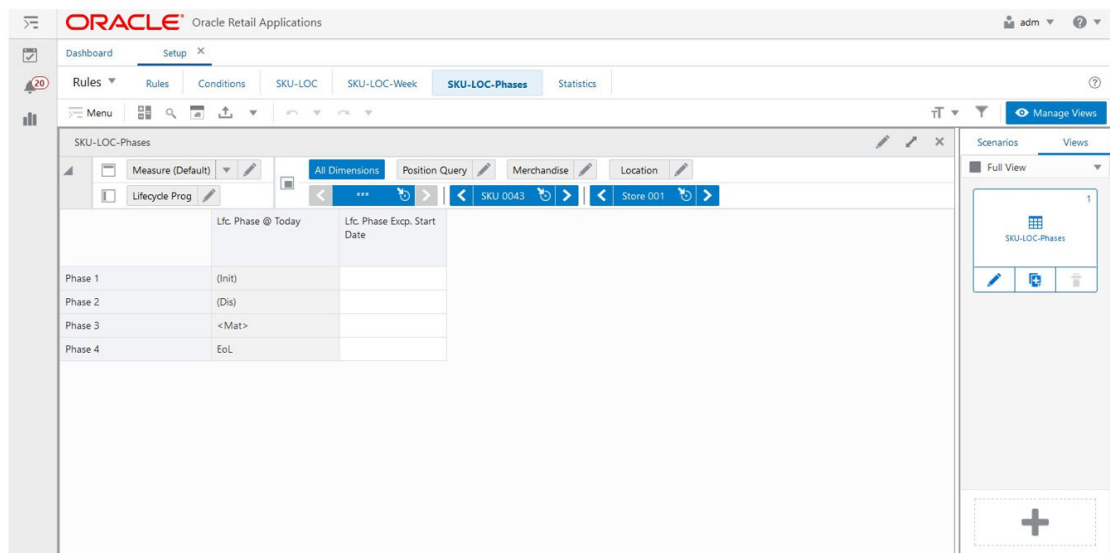
**Figure 19-34 Warning Icon**



## SKU-LOC-Phases View

The **SKU-LOC-Phases View**, under the **Review tab**, allows you to review the lifecycle phases for the product and location combinations. In addition, you are allowed to overwrite the start date of each lifecycle phase at the product and location combination level.

**Figure 19-35 SKU-LOC-Phases View**



### SKU-LOC-Phases View - Default Profile Measures

The SKU-LOC-Phases View contains the following measures.

#### **Lfc. Phase @ Today**

The Lifecycle Calendar Phase at Today is a loaded measure used to indicate the list of lifecycle phases for the product and location combination based on the lifecycle calendar set



up at the system date. The phase names are prefixed and suffixed to provide you with additional information, the logic is as follows:

- **< >**  
When the phase name is prefixed and suffixed this way, it means that the phase is the current lifecycle phase (for example, **<Maturity>**)
- **( )**  
When the phase name is prefixed and suffixed this way, it means that the phase is an elapsed/previous lifecycle phase (for example, **(Discovery)**)
- When the phase name has no prefix and suffix, it means the lifecycle phase has not been reached yet (for example, **EOL**)

#### **Lfc. Phase Excp. Start Date**

The Lifecycle Calendar Phase Exception Start Date is an editable measure that allows you to override the phase start date set up in the lifecycle calendar assigned to the product and location combination.

## Filter Step

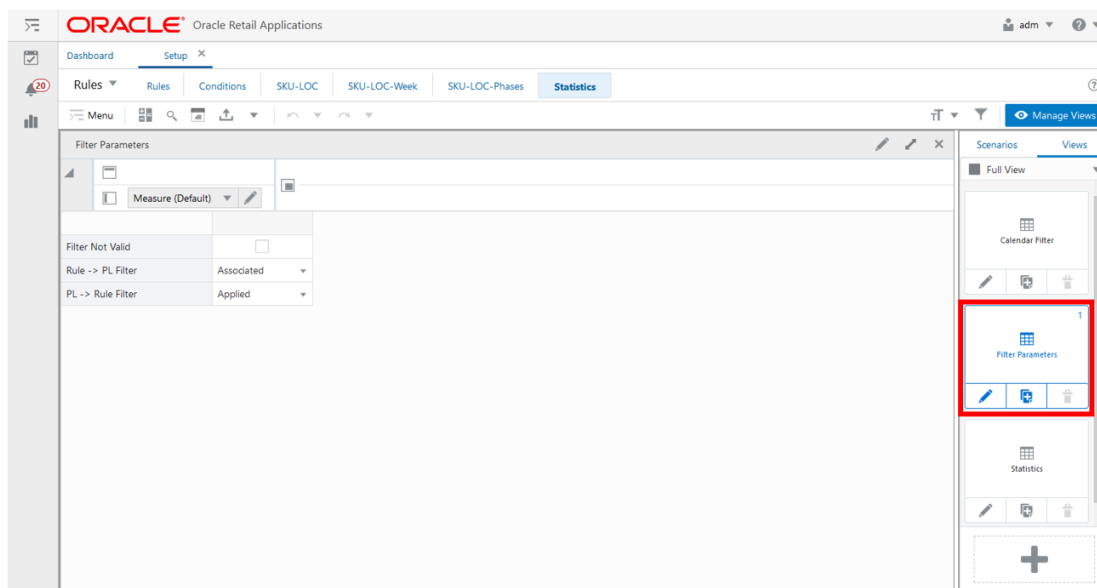
This step contains these views:

- [Filter Parameters View](#)
- [Calendar Filter View](#)

## Filter Parameters View

The **Filter Parameters View**, under the **Filter tab**, allows you to set up the filter that can change the scope of the products and locations displayed in all relevant views under the Rules Step within the Supply Chain Network Workspace.

Figure 19-36 Filter Parameters View



### Filter Parameters View - Default Profile Measures

The Filter Parameters View contains the following measures.

#### Filter Not Valid

The Filter Not Valid is an editable measure to change the scope of the products and locations displayed in all relevant views under the Rules Step. If the measure is selected the **Run Filter** action button is responsible to calculate the filters only displayed as non-valid product and location combinations. When clear the filter only displays valid product and location combinations. By default, the measure is clear. The measure PL Valid identifies whether a product and location combination is valid or not.

#### Rule -> PL Filter

Rule -> Product and Location Filter is an editable measure to select how the filter should work in the SKU- LOC view. Valid values are:

- Associated

The view is filtered to display the product and location combinations that are associated with the rules selected in the Rules view (measure Rule User Filter). Note that product and location combinations can fit within more than one rule. When they fit into a rule, they are associated regardless of whether that rule is the actual one to be applied.

- Applied

The view is filtered to display the product and location combinations that apply the rules selected in the Rules view (measure Rule User Filter). The rule is considered applied when the IPOCS-Lifecycle Allocation and Replenishment Rule Engine sets the replenishment set up for the product and location combination based on the rule (for example, BOD, PLC, and so on.).

#### PL -> Rule Filter

The Product and Location -> Rule Filter is an editable measure to select how the filter should work in the Rules view. Valid values are:

- **Associated**

The view is filtered to display rules that are associated with the product and location combinations selected in the SKU-LOC view (measure PL User Filter). Note that product and location combinations can fit into more than one rule. When they fit in a rule they are associated regardless of whether that rule is the actual one to be applied.

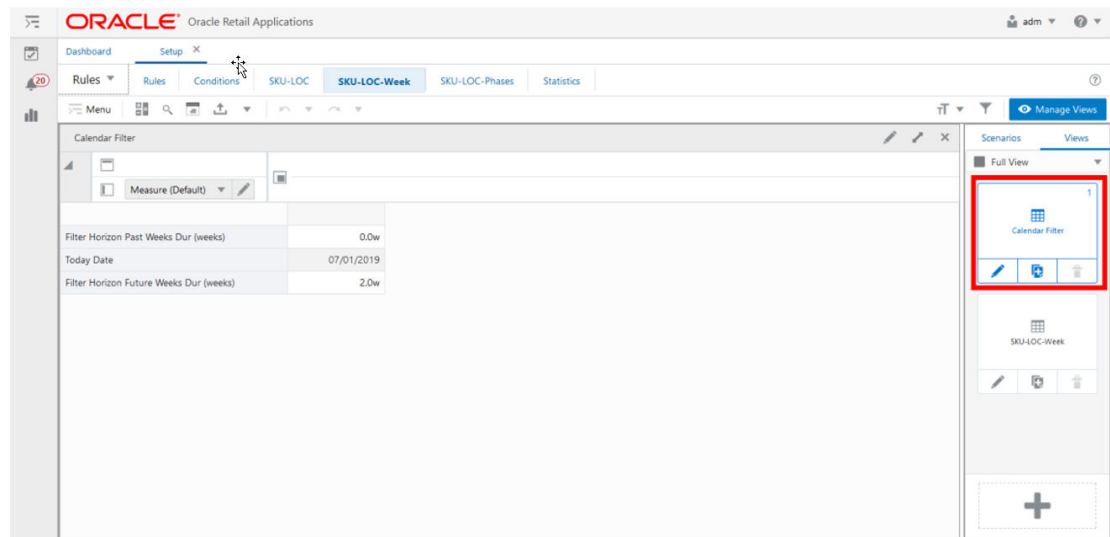
- **Applied**

The view is filtered to display rules that are associated with the product and location combinations selected in the SKU-LOC view (measure PL User Filter). The rule is considered applied when the IPOCS-Lifecycle Allocation and Replenishment Rule Engine sets the replenishment set up for the product and location combination based on the rule (for example, BOD, PLC, and so on.).

## Calendar Filter View

The **Calendar Filter View**, under the **SKU-LOC-Week tab** and **Statistics tab**, allows you to choose the number of weeks to filter based on the weeks displayed in the SKU-LOC view-Week. This view is the same as the Calendar Filter view under the Planning Calendar Step. For more details on the measures, check the Calendar Filter view measures in the Planning Calendar Step.

**Figure 19-37 Calendar Filter View**



## Supply Chain Network Action Buttons

The Supply Chain Network workspace has the following action buttons available:

- **Copy-Paste Exceptions**

Use the **Copy-Paste Exceptions** action button to copy the planning daily exceptions from the planning calendar selected as the source of the copy and paste into all planning calendars selected as the destination of the copy. This action only copies the daily exceptions. It does not copy any other planning calendar (for example, weekdays).

- **Copy-Paste LFC**

Use the **Copy-Paste Lifecycle Calendar** action button to copy the lifecycle calendar information from the lifecycle calendar selected as the source of the copy and paste it into all the lifecycle calendars selected as the destination of the copy. This action copies all the information in the lifecycle calendar view and lifecycle phase view.
- **Copy-Paste Rules**

Use the **Copy-Paste Rules** action button to copy all rule information from the rule selected as the source of the copy and paste it into all rules selected as the destination of the copy. This action copies all the information in the Rules view and Conditions view.
- **Rule Conditions**

Use the **Rule Conditions** action button for the calculation of the rule's conditions based on the set up completed in the Conditions view. The result of the calculation is written into the measure Rule Condition in the Rules view.
- **Rule Engine**

Use the **Rule Engine** action button for running the IPOCS-Lifecycle Allocation and Replenishment Rules Engine to calculate which rule's replenishment set up would be applied to the product and location combination level. The results of the run are visible in the statistic measures of the Rules view as they are updated with the run results. To ensure that the IPOCS-Lifecycle Allocation and Replenishment Rules Engine is run with the right conditions for all the rules, this action button runs the Rule Conditions first, as part of its process.
- **Rule Apply**

Use the **Rule Apply** action button for applying the rule's replenishment set up, from the last Rule Engine run, down to the product and location combination level. The results of the run are visible in the SKU-LOC view as the measures are updated with the run results.
- **Rule Engine + Apply**

Use the **Rule Engine + Apply** action button to run the **Rule Engine** action button followed by the run of the **Rule Apply** action button. As a result, the IPOCS-Lifecycle Allocation and Replenishment Rule Engine is run, and the results are applied down to the product and location combination level immediately.
- **Clear Filter**

Use the **Clear Filter** action button to remove all filters applied in the Supply Chain Network view and clear all User Filter measures within the workspace.
- **Run Filter**

Use the **Run Filter** action button to apply the filters in the Supply Chain Network views based on the filter set up completed within the workspace. For example, the calendar horizon or check the filtered measures.
- **Reload Attributes**

Use the **Reload Attributes** action button to load the product, location, and product-location attributes from the domain into the workspace. It refreshes the measures available for all the views under the Attributes Step.
- **Commit Attributes**

Use the **Commit Attributes** action button to save the domain, product, location, and product-location attributes. This functionally ensures that any user changes to the attributes within the workspace are saved and committed to the domain.

 **Note:**

When product, location and product-location attributes are interfaced into IPOCS-Lifecycle Allocation and Replenishment your changes are overridden by the interface values during the batch run.

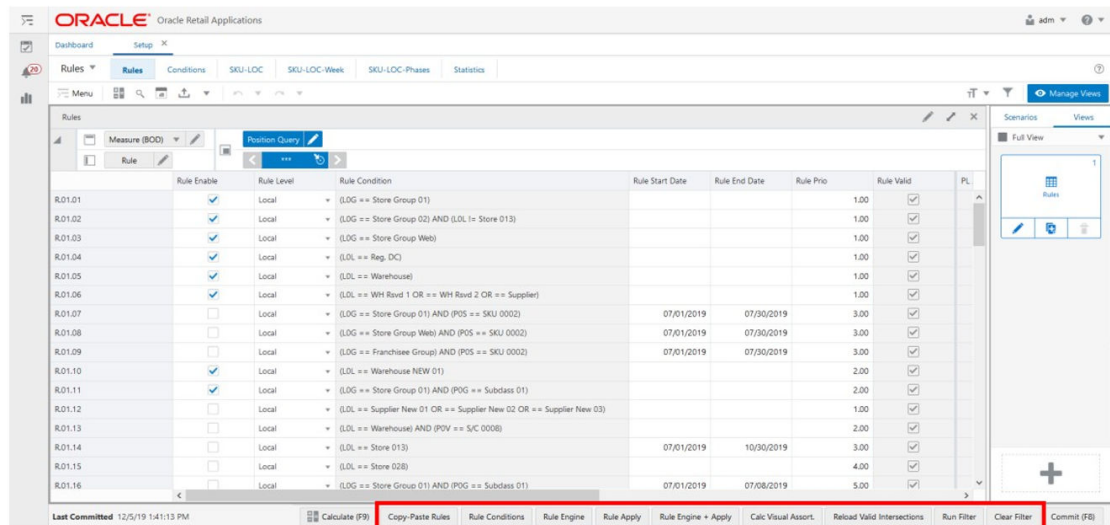
- **Calc. Visual Assort.**

Use the **Calculate Visual Assortment** action button to display a visual representation of your assortment.

- **Reload Valid Intersections**

Use the **Reload Valid Intersections** action button to load the assortment information from the domain into the workspace. It refreshes all assortment and lifecycle related information. You can use this option when changes are performed in the Assortment Admin workspace and should be refreshed in the Supply Chain Network workspace.

**Figure 19-38 Supply Chain Network Action Buttons**



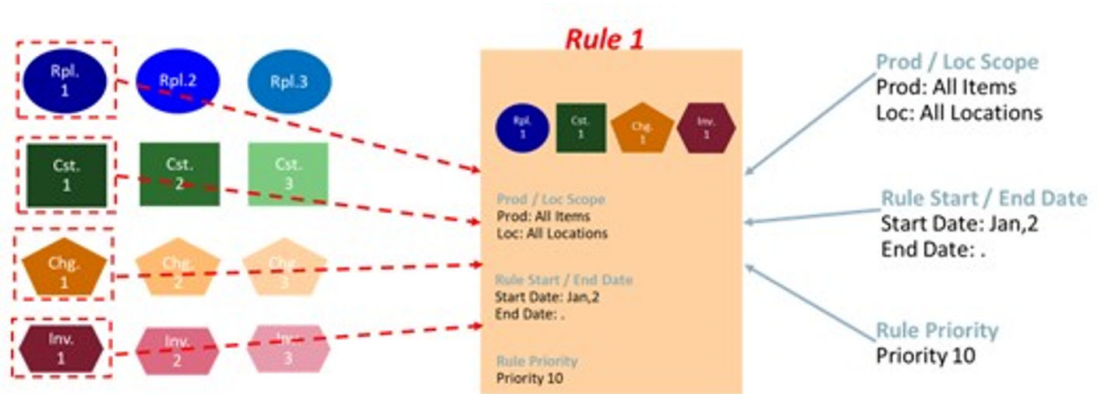
# 20

## Replenishment Parameters

This chapter describes the functionality that allows you to set up and review the replenishment and inventory parameters that are used within the Allocation & Replenishment calculations. The Replenishment Parameters Workspace is where you can set up the replenishment parameters, change parameters, constraint parameters and inventory planning parameters. Once they are defined you can configure rules and conditions to specify where they should be applied. In a similar way to the Supply Chain Network workspace, the rule engine does the heavy work for you and calculates the right parameters at the product and location level using the available assortment and lifecycle information.

You can further specify the priority and the period where the rule should apply (start and end date if applicable). Based on the set up, the rules engine determines the most appropriate rule and then distributes the parameter to each item and location.

**Figure 20-1 Rules Engine Process**



## Replenishment Parameters Workspace, Steps, and Views

The following table lists the workspaces, steps, and views of the Replenishment Parameters task.

**Table 20-1 Replenishment Parameters Workspace, Steps, and Views**

Workspace	Steps	Tab	Views
Replenishment Parameters Workspace	Overview	Overview	Statistics View
		Scope	Location Scope View
			Product Scope View

**Table 20-1 (Cont.) Replenishment Parameters Workspace, Steps, and Views**

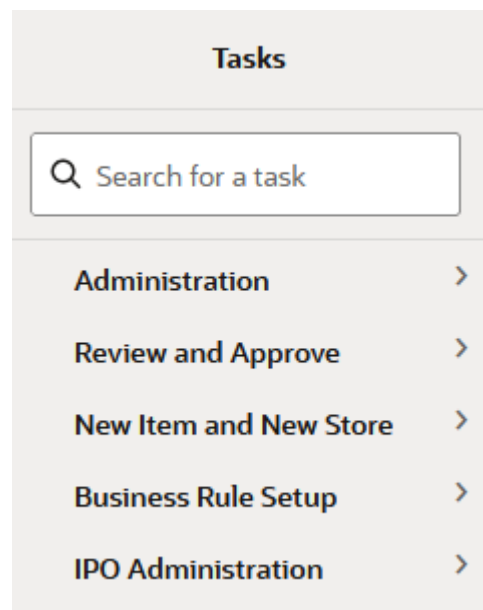
Workspace	Steps	Tab	Views
	Replenishment Parameters	Replenishment Parameters	Replenishment Parameters View
			Replenishment Change Parameters View
			Default Replenishment Parameters View
	Inventory Plan Parameters	Inventory Plan Parameters	Inventory Plan Parameters View
	Constraint Parameters	Constraint Parameters	Constraint Parameters View
			Default Store Priority View
	Rules	Setup	Conditions View
			Rules View
		Review	SKU-LOC View
	Filter	Filter	Filter Parameters View

## Replenishment Parameters Workspace

The Replenishment Parameters workspace allows you to access all the views listed in the Replenishment Parameters Workspace, Steps, and Views. To build the Replenishment Parameters workspace, perform these steps:

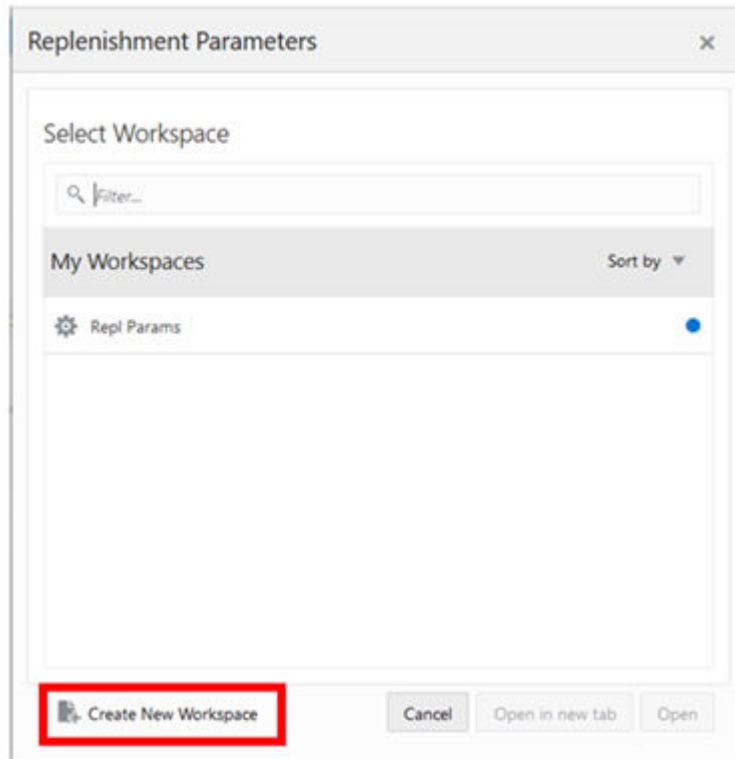
1. From the left sidebar menu, click the **Task Module** to view the available tasks.

**Figure 20-2 Task Module**



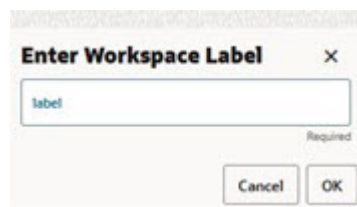
2. Click the **Business Rule Setup** activity to access the available workspaces.
3. Click **Replenishment Parameters**.
4. The Replenishment Parameters wizard opens. You can open an existing workspace, but to create a new workspace, click **Create New Workspace**.

**Figure 20-3 Replenishment Parameters Wizard**



5. Enter a name for your new workspace in the label text box and click **OK**.

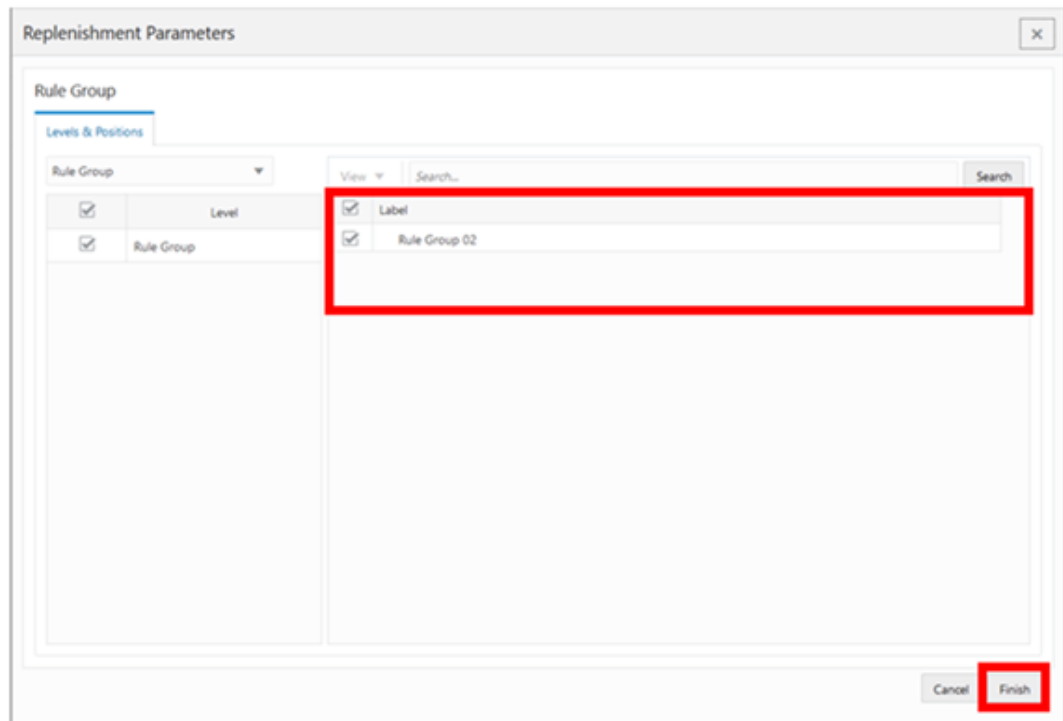
**Figure 20-4 Enter Workspace Label**



6. Select the rule groups you want to work with and click **Finish**.



Figure 20-5 Workspace Wizard: Rule Groups



 **Note:**

Only the rule groups that are from the Replenishment rule group type are available for selection. The rule group type value is managed in the Manage Rule Groups workspace.

7. The wizard notifies you that your workspace is being prepared. Successful workspaces are available from the Dashboard.

Figure 20-6 Successful Workspace Build

The screenshot displays the Oracle Retail Applications dashboard. The main content area shows a 'Task Status' table with the following data:

Description	Status	Task Type	Submitted by	Started/Scheduled	Completed	Record Status
Replenishment Parameters	Success	WebBatch Build	ee.admin	11/12/2020 20:19:17	11/12/2020 20:19:33	NA
Repl Params	Success	WebBatch Build	ee.admin	11/12/2020 19:39:47	11/12/2020 19:40:10	NA
Network	Success	WebBatch Build	ee.admin	11/12/2020 11:48:27	11/12/2020 11:49:14	NA

The 'Recent Workspaces' list on the right side of the dashboard shows the following items:

- Replenishment Parameters (Last Opened: 11 Dec 2020 20:19:14)
- Repl Params (Last Opened: 11 Dec 2020 19:40:33)
- Network (Last Opened: 11 Dec 2020 11:56:32)
- new Network (Last Opened: 11 Dec 2020 10:36:25)
- Alert Parameters (Last Opened: 10 Dec 2020 16:16:38)
- Rule Groups (Last Opened: 10 Dec 2020 10:21:24)
- RuleGroups-Old (Last Opened: 9 Dec 2020 14:53:30)
- Databags (Last Opened: 9 Dec 2020 09:23:13)

**Note:**

The workspace is built using the selected rule group scope. The products, locations, source locations and attributes available in the workspace are the ones in the rule group scope that is managed in the Manage Rule Groups workspace.

## Overview Step

This step contains these views:

- [Statistics View](#)
- [Location Scope View](#)
- [Product Scope View](#)

## Statistics View

The **Statistics View**, under the **Overview tab**, allows you to review the statistics of the Replenishment Parameters. The view has statistical information regarding the number of valid counts for each set up (for example, Replenishment Parameters, Change Parameters) and rules. It also provides the number of product and location combinations within the workspace.

**Figure 20-7 Statistics View**

Measure (Default)	Parameters
Rule Group Type	Parameters
Rule Group User Descr.	Parameters
Last Rule Group Publish UserID	uid000000
Last Rule Group Publish Date	31/03/2019
Repl. Valid Count	20
Chg. Valid Count	3
Cstr. Valid Count	6
Inv. Plan. Valid Count	7
Rule Valid Count	19
All Pl. Count	40,923
Pl. Valid Count	9,158
Pl. Valid %	22.4 %

**Statistics View - Default Profile Measures**

The Statistics view contains the following measures.

**Rule Group Type**

Rule Group Type is a loaded read-only measure used to display the rule group type that was set up for the rule group in the Manage Rule Group workspace.

**Rule Group User Descr.**

Rule Group User Description is a loaded read-only measure used to display the user-description that was set up for the rule group in the Manage Rule Group workspace.

**Last Rule Group Publish User ID**

Last Rule Group Publish User ID is a loaded read-only measure used to display the user-identifier that performed the last rule group's change in the Manage Rule Group workspace.

**Last Rule Group Publish Date**

Last Rule Group Publish Date is a loaded read-only measure used to display the date and time when the last rule group's change was performed in the Manage Rule Group workspace.

**Repl. Valid Count**

Replenishment Valid Count is a calculated measure used to display the total number of valid replenishment parameters that are set up for the rule group.

**Chg. Valid Count**

Change Valid Count is a calculated measure used to display the total number of valid change parameters that are set up for the rule group.

**Cstr. Valid Count**

Constraint Valid Count is a calculated measure used to display the total number of valid constraint parameters that are set up for the rule group.

**Inv. Plan. Valid Count**

Inventory Plan Valid Count is a calculated measure used to display the total number of valid inventory plan parameters that are set up for the rule group.

### Rule Valid Count

Rule Valid Count is a calculated measure used to display the total number of valid rules that are set up for the rule group.

### All PL Count

All Product and Location Count is a calculated measure used to display the total number of product and location combinations that have a lifecycle phase value.

### PL Valid Count

Product and Location Valid Count is a calculated measure used to display the total number of product and location combinations that have a valid rule assigned.

### PL Valid %

Product and Location Valid Percentage is a calculated measure used to indicate, in percentage, how much the product and location combinations with a valid rule assigned represent in the total of product and location combinations with a lifecycle phase value. The measure is calculated as:

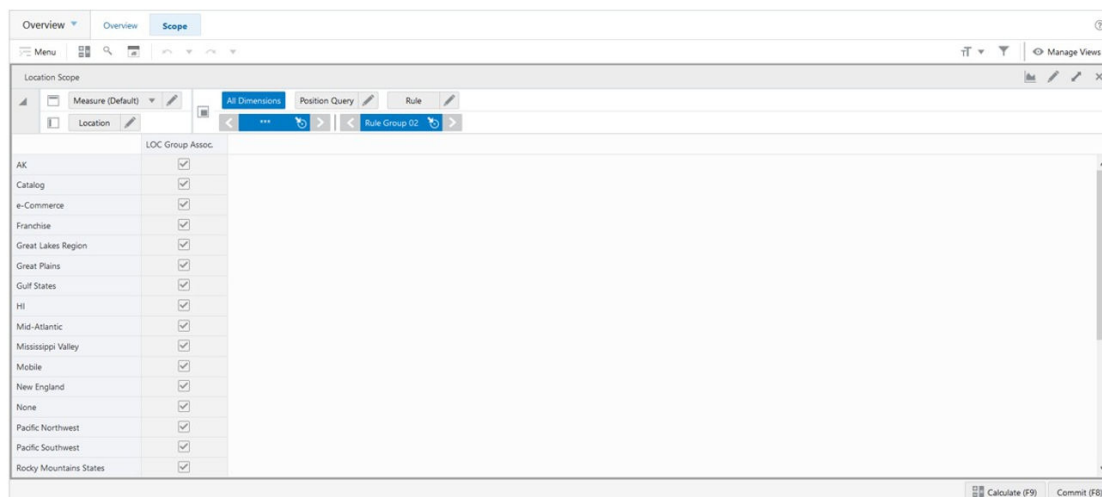
**Figure 20-8 Calculation**

$$100 * \frac{PLValidCount}{AllPLCount}$$

## Location Scope View

The **Location Scope View**, under the **Scope** tab, allows you to review what specific locations are in the scope of a rule group and loaded into the workspace.

**Figure 20-9 Location Scope View**



### Location Scope View - Default Profile Measures

The Location Scope view contains the following measure.

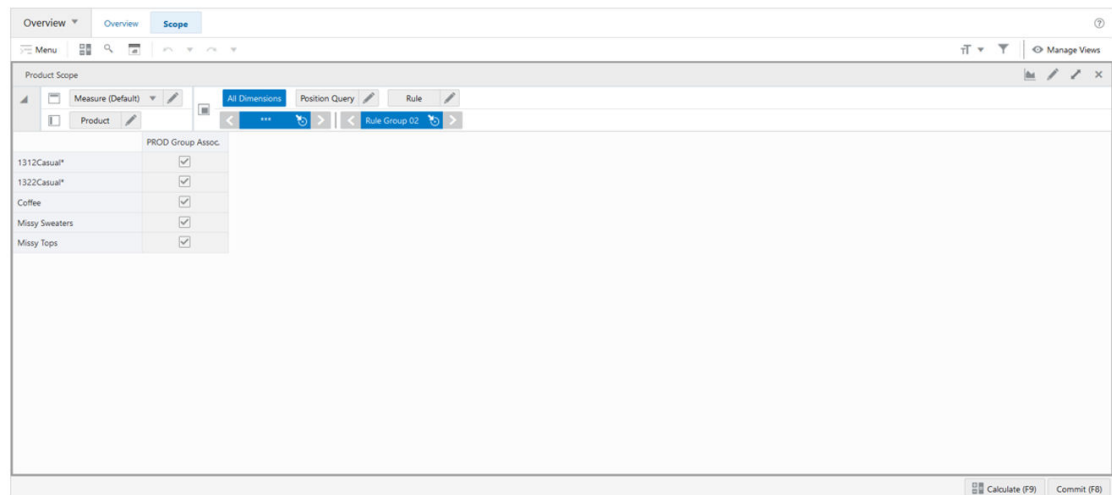
#### LOC Group Assoc.

Location Group Associated is a loaded read-only measure used to indicate the location groups that are associated with the rule group. This measure is managed in the Manage Rule Groups workspace.

## Product Scope View

The **Product Scope View**, under the **Scope tab**, allows you to review what specific products are in the scope of a rule group and loaded into the workspace.

**Figure 20-10 Product Scope View**



### Product Scope View - Default Profile Measures

The Product Scope view contains the following measure.

#### PROD Group Assoc.

Product Group Associated is a loaded read-only measure used to indicate the products groups that are associated with the rule group. This measure is managed in the Manage Rule Groups workspace.

## Replenishment Parameters Step

This step contains these views:

- [Replenishment Parameters View](#)
- [Replenishment Change Parameters View](#)
- [Default Replenishment Parameters View](#)

## Replenishment Key Concepts

Replenishment parameters are used to specify the Reorder Level (ROL) and the Reorder Up to Level (RUTL) methods along with the associated parameters that is used in generating point in time planned orders.

Reorder Level (ROL) is the inventory level that determines whether an order for replenishment should be placed at the time of review or not. At the time of review, if the stock levels are less than the ROL, then an order for replenishment is placed, otherwise it is ignored until the next cycle.

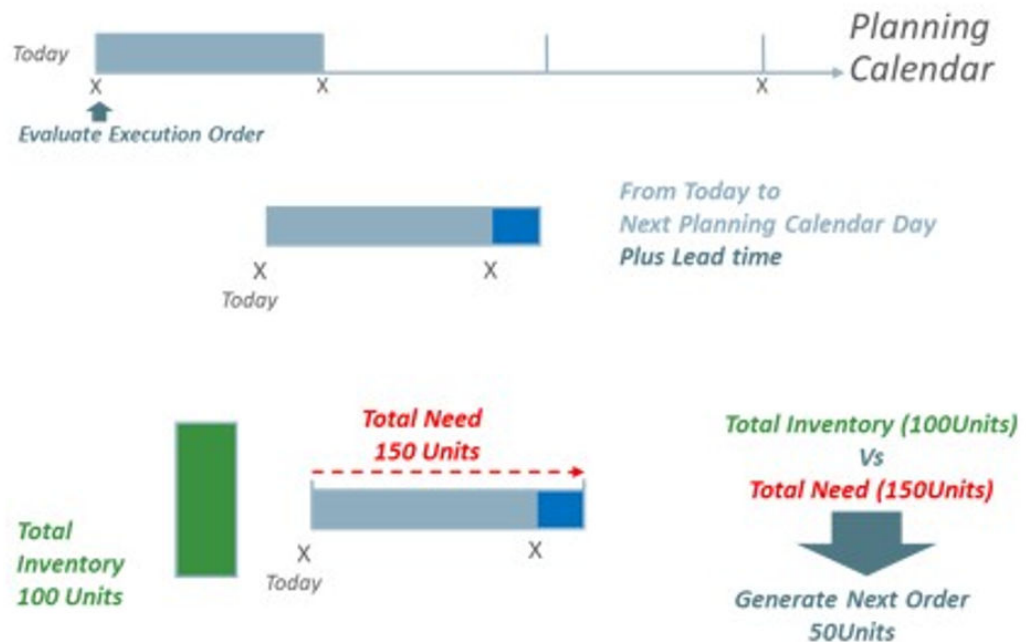
Reorder Up to Level (RUTL) is level that must be maintained to meet expected service levels for demand fulfilment.

**Figure 20-11 ROL and RUTL**



The replenishment is a point in time replenishment. In another words, it calculates the replenishment units, for a particular product and location combination, to fulfil the demand from the system date until the next planning day in the planning calendar plus the lead time.

Figure 20-12 Point in Time Replenishment



### Point in Time Replenishment Methods

Lifecycle Inventory Planning has the following replenishment methods for the ROL and RUTL calculations.

#### ROL Methods

- **Statistical SS (Statistical Safety Stock):** This replenishment method calculates the ROL taking into account the cumulated demand forecast from current date up to the number of days set as Lead Time plus Next Review Time. It considers the Target Service Level (Tgt SL %) and Volatility (Volatility %) in the calculation too
- **Min Time Supply (Minimum Time Supply):** This replenishment method calculates the ROL taking into account the cumulated demand forecast from current date up to the number of days defined as minimum time to supply (in days).
- **Min Quantity (Minimum Quantity):** This replenishment method calculates the ROL taking into account the value defined as the minimum quantity units.
- **Min Safety Time (Minimum Safety Time):** This replenishment method calculates the ROL to the cumulated demand forecast from the first forecast date up to the number of days set to Lead Time plus Next Review Time plus the number of days to shift set in Min Safety Time (days).
- **Min (Minimum):** This replenishment method calculates the ROL to the minimum of the active ROL methods.
- **Max (Maximum):** This replenishment method calculates the ROL to the maximum of the active ROL methods.
- **Sum (Sum):** This replenishment method calculates the ROL to the sum of the active ROL methods.

#### RUTL Methods

- **Max Quantity (Maximum Quantity):** This replenishment method calculates the RUTL taking into account the value defined as the maximum quantity units.
- **Max Time Supply (Minimum Time Supply) :** This replenishment method calculates the RUTL taking into account the cumulated demand forecast from current date up to the number of days defined as maximum time to supply (in days).
- **Target DOS (Days Of Supply):**This replenishment method calculates the RUTL taking into account the cumulated demand forecast from current date up to the number of days defined as days of supply or up to the number of days of Lead Time plus Next Review Time. The application picks the highest number of days between the two options.
- **Target Stock:** This replenishment method more suitable to the short lifecycle products. The replenishment engine calculates the RUTL based on a target stock quantity. The target stock quantity can be calculated using the following options.
  - **Fixed 1:** This method sets the target stock to the initial allocation quantity (loaded from external sources).
  - **Fixed 2:** This method sets the target stock to an user-entered allocation quantity (managed within IPOCS-Lifecycle Allocation and Replenishment).
  - **Fixed 3:** This method sets the target stock to any other potential source for the initial allocation (this is a placeholder than can be used by customers).
  - **Ssn Perc:** This method sets the target stock a percentage of the total season sales. Used to define percentage to calculate the value from the total initial forecast for the season.
  - **Sft. Time:** This method sets the target stock to the cumulated demand forecast from the first forecast date in the future up to the number of days set to Lead Time plus Next Review Time plus the number of days to shift.
  - **Stat SS (Statistical Safety Stock):** This method sets the target stock to the cumulated demand forecast from current date up to the number of days set as Lead Time plus Next Review Time. It considers the Target Service Level (Tgt SL %) and Volatility (Volatility %) in the calculation too.
  - **EOL (End of Life):** This method sets the target stock to the cumulated demand forecast from current date up to the end of life date. It considers the Target Service Level (Tgt SL %) and Volatility (Volatility %) in the calculation too.
- **Min (Minimum):** This method sets the target stock to the minimum of the active Target Stock methods (excluding End of Life).
- **Max (Maximum):** This method sets the target stock to the maximum of the active Target Stock methods (excluding End of Life).
- **Sum (Sum):** This method sets the target stock to the sum of the active Target Stock methods (excluding End of Life).
- **Min (Minimum):** This replenishment method calculates the RUTL to the minimum of the active RUTL methods.
- **Max (Maximum):** This replenishment method calculates the RUTL to the maximum of the active RUTL methods.
- **Sum (Sum):** This replenishment method calculates the RUTL to the sum of the active RUTL methods.



Figure 20-13 Point in Time Replenishment Methods



Figure 20-14 ROL and RUTL Method Details

Target DOS	RUTL = total demand over max (TargetDOS, Lead Time + Review Time)
Max Time Supply	RUTL = total demand over Max TS
Max Quantity	RUTL = Max Quantity
Min / Max / Sum of active above	RUTL = Min / Max / Sum of active above
Min Quantity	ROL = Min Quantity
Min Time Supply	ROL = total demand over Min TS
Statistical SS	ROL = stepwise merge of the inverse cumulative Poisson and Gaussian distribution with average (total demand over Lead Time + Review Time) <sup>4</sup> (1 + Volatility), calculated at Target Service Level
Min Safety Time	ROL = total demand over Lead Time + Review Time + Min Safety Time
Min / Max / Sum of active above	ROL = Min / Max / Sum of active above

Figure 20-15 ROL and RUTL Method: Target Stock Details



## Replenishment Parameters View

The **Replenishment Parameters View**, under the **Replenishment Parameters tab**, allows you to set up of all possible Replenishment Parameters that can be used by the replenishment parameters rules to be applied on products and locations for the Replenishment (Point-In-Time) calculation. Each list (row) in the view represents a different replenishment parameter set up.

Figure 20-16 Replenishment Parameters View

The screenshot shows the 'Replenishment Parameters' view in Oracle ERP. It displays a table with 15 rows of parameters. The columns include: Repl. Enable, Repl. Valid, Repl. Desc, Repl. User Desc, Min Cred. Qty Units, ROL Meth., Min Qty Units, Min TS Dur (d), Tgt. SL %, Volatility %, ROL St. Time Dur (d), RUTL Meth., Tgt. DoS Dur (d), TS Meth., TS SL Time Dur, TS Seas. Fcst %, Max Qty Units, and Max TS Dur (d). The rows represent different replenishment methods such as 'Fixed', '% of Total Season Sales', 'Safety Time', 'Statistical SS', 'Min / Max / Sum of active above', and 'End of Life + Service Level %'.

### Replenishment Parameters View - Default Profile Measures

The Replenishment Parameters view contains the following measures.

#### Repl. Enable

Replenishment Enable is an editable measure used to enable or disable a replenishment parameter. Each row (or list) represents a different replenishment parameter.

#### Repl. Valid

Replenishment Valid is a calculated measure used to indicate if the set up of the replenishment parameter is valid or not. For example, if the ROL and RUTL methods are missing then the replenishment parameter is not valid for the rule engine.

**Repl. Desc.**

Replenishment Description is a calculated measure used to indicate the replenishment parameter description. The description is calculated based on the replenishment parameter user-defined description and the replenishment parameter set up selected by you.

**Repl. User Desc.**

Replenishment User Description is an editable measure used to enter a user-defined replenishment parameter description. The final replenishment parameter description takes the user-defined description into consideration. The entered value must not contain a colon punctuation mark (:).

**Min Cred. Qty Units**

Minimum Credit Quantity Units is an editable measure used to define the minimum amount of stock desired to have on hand for sales purposes.

**ROL Meth.**

Reorder Level Method is an editable measure to select the method to be used by the replenishment engine to calculate the ROL. Valid values are:

- -  
Option to clear the ROL Method.
- **Min Qty**  
Option to set up the ROL Method as the Minimum Quantity method. When selected the ROL is calculated to the value set in the measure Min Quantity Units.
- **Min TS**  
Option to set up the ROL Method as the Minimum Time Supply method. When selected the ROL is calculated value of the cumulated demand forecast from current date up to the number of days set in the measure Min TS Dur (d).
- **Stat SS**  
Option to set up the ROL Method as the Statistical Safety Stock method. When selected the ROL calculation uses the lead time, the next review time in the planning calendar, the service level set in the measure Tgt. SL % and the volatility set in the measure Volatility %.

 **Note:**

When the RUTL method is set to Tgt Stk the RUTL and ROL will have the same value. No need to select the ROL method in this case.

**Min Qty Units**

Minimum Quantity Units is an editable measure used to fix the minimum amount of stock desired when the ROL method is set to Min Quantity.

**Min TS Dur (day)**

Minimum Time Supply Duration (d) is an editable measure used to fix the number of days to use to calculate the ROL value from the cumulative demand forecast. This measure is used when the ROL method is set to Min TS.

#### **Tgt. SL %**

Target Service Level Percentage is an editable measure used to define the service level. This value is used in the ROL and RUTL calculation when the statistical safety stock method is used.

#### **Volatility %**

Volatility Percentage is an editable measure used to define the volatility. This value is used in the ROL and RUTL calculation when the statistical safety stock method is used.

#### **ROL Sft. Time Dur (d) RUTL Meth.**

Reorder Level Sft. Time Duration (day) Reorder Up to Level Method is an editable measure to select the method to be used by the replenishment engine to calculate the RUTL. The valid values are:

- -  
Option to clear the RUTL Method.
- **Max Qty**  
Option to set up the RUTL Method as the Maximum Quantity method. When selected the RUTL is calculated to the value set in the measure Max Quantity Units.
- **Max TS**  
Option to set up the RUTL Method as the Maximum Time Supply method. When selected the RUTL is calculated to the value of the cumulated demand forecast from current date up to the number of days set in the measure Max TS Dur (d).
- **Tgt. DoS**  
Option to set up the RUTL Method as the Target Days of Supply method. When selected the RUTL is calculated to the value of the cumulated demand forecast from current date up to the highest number of days from the following options.
  - Number of days fixed in the measure Tgt. DoS Dur (d)
  - Number of days of lead time plus number of days to the next review time
- **Tgt Stk**  
Option to set up the RUTL Method as the Target Stock method. When selected the RUTL is calculated using the method selected in the measure TS Meth.

 **Note:**

When the RUTL method is set to Tgt Stk the RUTL and ROL will have the same value. No need to select the ROL method in this case.

#### **Tgt. DoS Dur (d)**

Target Days of Supply Duration (day) is an editable measure used to fix the number of days to use to calculate the RUTL value from the cumulative demand forecast. This measure is used when the RUTL method is set to Tgt DoS.

#### **TS Meth.**

Target Stock Method is an editable measure to select the target stock method to be used by the replenishment engine when the RUTL method is Tgt Stk. The valid values are:

- -  
Option to clear the target stock Method.
- **Fixed 1**  
When selected the target stock is calculated to the value set in the measure TS Fixed 1 (initial allocation).
- **Fixed 2**  
When selected the target stock is calculated to the value set in the measure TS Fixed 2 (manual allocation).
- **Fixed 3**  
When selected the target stock is calculated to the value set in the measure TS Fixed 3 (placeholder for other source of allocation).
- **Ssn Perc**  
When selected the target stock is calculated as a percentage of the total forecast sales for the season. The percentage used in the calculation is the one set in the measure TS Seas. Fcst %.
- **Sft Time**  
When selected the target stock is calculated to the value of the cumulated demand forecast from current date up to the number of days of the lead time plus the number of days to the next review time plus the number of days for the Target Stock Safety Time Duration (measure TS Sft. Time Dur (d)).
- **Stat SS**  
When selected the target stock is calculated to the value of the cumulated demand forecast plus the safety stock from current date up to the number of days of the Lead Time plus the number of days for the next review time plus the number of days for the Target Stock Safety Time Duration (measure TS Sft. Time Dur (d)). It also considers the service level set in the measure Tgt. SL % and the volatility set in the measure Volatility % when calculating the target stock.
- **EOL**  
When selected the target stock is calculated to the value of the cumulated demand forecast plus the safety stock from current date up to the number of days to reach the end-of-life date. It also considers the service level set in the measure Tgt. SL % and the volatility set in the measure Volatility % when calculating the target stock.
- **Min**  
When selected the target stock is the minimum value from the methods of Fixed, % of Total Season Sales, Safety Time and Statistical SS.
- **Max**  
When selected the target stock is the maximum value from the methods of Fixed, % of Total Season Sales, Safety Time and Statistical SS.

#### **TS Sft. Time Dur (d)**

Target Stock Sft. Time Duration (day) is an editable measure used to set the number of days for the stock safety. This value is used in the target stock calculations when the RUTL method (RUTL Meth.) is set to Tgt Stk and the target stock method (TS Meth.) is set either to Sft Time or to Stat SS.

**TS Seas. Fcst %**

Target Stock Seasonal Forecast Percentage is an editable measure used to set the percentage of the Seasonal Forecast that should be used to calculate the target stock. This value is used when the RUTL method (RUTL Meth.) is set to Tgt Stk and the target stock method (TS Meth.) is set Ssn Perc.

**Max Qty Units**

Max Quantity Units is an editable measure used to fix the maximum amount of stock desired when the RUTL method is set to Max Quantity.

**Max TS Dur (d)**

Max Target Stock Duration (day) is an editable measure used to fix the number of days to use to calculate the RUTL value from the cumulative demand forecast. This measure is used when the RUTL method is set to Max TS.

**Order Round**

Order Round is an editable measure used to set the percentage on when to round up the orders if the pack size is greater than 1.

**Rule Rpl. Count**

Rule Replenishment Count is a calculated measure used to display the total number of rules that are using the replenishment parameter.

**PL Rpl. Count**

Product and Location Replenishment Count is a calculated measure used to display the total number of product and location combinations that associated with the replenishment parameter.

**PL Rpl. %**

Product and Location Replenishment Percentage is a calculated measure used to indicate, in percentage, how much the product and location combinations associated with the replenishment parameter represents in the total of product and location combinations with a lifecycle phase value. The measure is calculated as:

**Figure 20-17 Calculation**

$$100 * \frac{PLRplCount}{AllPLCount}$$

**Rpl. User Filter**

Rpl. User Filter is an editable measure used to select the replenishment parameter to filter the views by the selected replenishment parameter. This measure is used by the **Run Filter** action button responsible to calculate the filters applied to the views within the Replenishment Parameters workspace.

## Replenishment Change Parameters Concept

Replenishment change parameters allows you to set up parameters to override the system calculated Re-Order Level (ROL) and the Re-Order Up to Level (RUTL) values (calculated from the replenishment parameters set up).

The change replenishment parameters provide the following capabilities. You can:

- Define a percentage to increase or decrease the system calculated ROL and RUTL.
- Override the replenishment parameters status. When a replenishment parameter status is enabled, the change parameter can force the replenishment parameter status to disable and the other way around.

As an example, the replenishment change parameters can be leveraged to prepare for an upcoming event by incising the RUTL providing the adequate stock to cover the upcoming demand.

Following are some examples of a set up for the change parameters:

- **ON** – Overrides replenishment parameters status to Enable OFF – Overrides replenishment parameters status to Disable
- **RUTL +10%** – Overrides the system calculated receipt up to level to increase it by 10%
- **RUTL +25 %** – Overrides the system calculated receipt up to level to increase it by 25%
- **RUTL -10 %** – Overrides the system calculated receipt up to level to decrease it by 10%
- **RUTL -25 %** – Overrides the system calculated receipt up to level to decrease it by 25%

Figure 20-18 Replenishment Change Parameters RUTL +10%

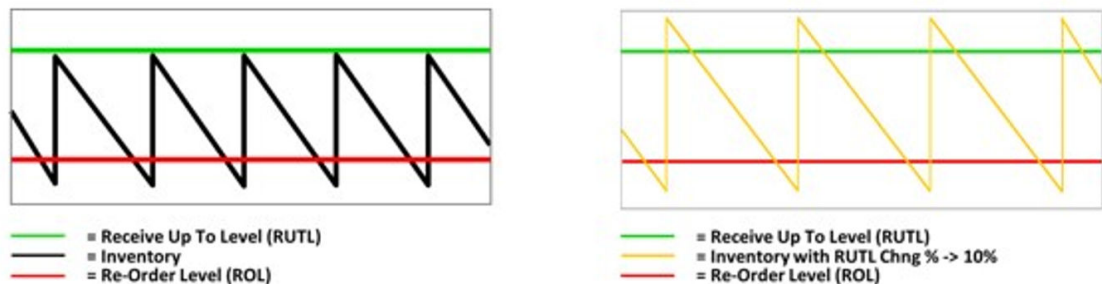
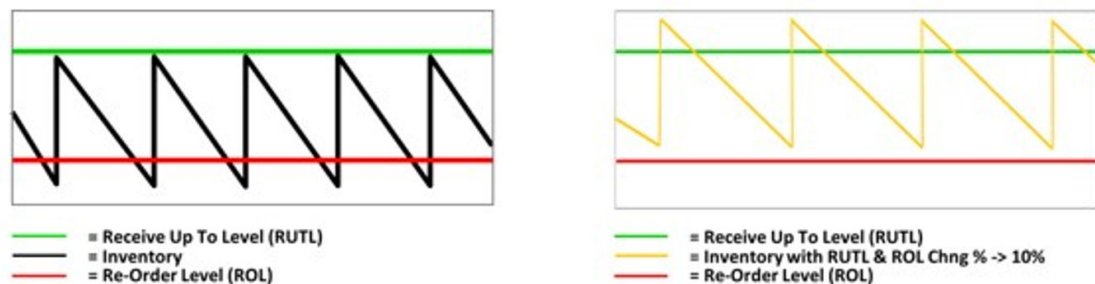


Figure 20-19 Replenishment Change Parameters RUTL +10% & ROL +10%



## Replenishment Change Parameters View

The **Replenishment Change Parameters View**, under the **Replenishment Parameters** tab, allows you to set up changes to the existing replenishment set up. The change parameters allows you to increase or decrease the calculated RUTL and ROL values and also allows you to override the replenishment status by enabling or disabling it.

**Figure 20-20 Replenishment Change Parameters View**

	Chg. Enable	Chg. Valid	Chg. Desc	Chg. User Desc	Repl. Status	ROL Chng %	RUTL Chng %	Rule Chg. Count	PL Change Count	PL Change %	Chg. User Filter
L01	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[RUTL+50%] RUTL+50%	RUTL+50%	Default	%	50.0 %			%	<input type="checkbox"/>
L02	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[RUTL+100%] RUTL+100%	RUTL+100%	Default	%	100.0 %			%	<input type="checkbox"/>
L03	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[OR] Status:Off	Off	Off	%	%			%	<input type="checkbox"/>
L04	<input type="checkbox"/>	<input type="checkbox"/>	-		Default	%	%			%	<input type="checkbox"/>
L05	<input type="checkbox"/>	<input type="checkbox"/>	-		Default	%	%			%	<input type="checkbox"/>
L06	<input type="checkbox"/>	<input type="checkbox"/>	-		Default	%	%			%	<input type="checkbox"/>
L07	<input type="checkbox"/>	<input type="checkbox"/>	-		Default	%	%			%	<input type="checkbox"/>
L08	<input type="checkbox"/>	<input type="checkbox"/>	-		Default	%	%			%	<input type="checkbox"/>
L09	<input type="checkbox"/>	<input type="checkbox"/>	-		Default	%	%			%	<input type="checkbox"/>
L10	<input type="checkbox"/>	<input type="checkbox"/>	-		Default	%	%			%	<input type="checkbox"/>
L11	<input type="checkbox"/>	<input type="checkbox"/>	-		Default	%	%			%	<input type="checkbox"/>
L12	<input type="checkbox"/>	<input type="checkbox"/>	-		Default	%	%			%	<input type="checkbox"/>
L13	<input type="checkbox"/>	<input type="checkbox"/>	-		Default	%	%			%	<input type="checkbox"/>
L14	<input type="checkbox"/>	<input type="checkbox"/>	-		Default	%	%			%	<input type="checkbox"/>
L15	<input type="checkbox"/>	<input type="checkbox"/>	-		Default	%	%			%	<input type="checkbox"/>
L16	<input type="checkbox"/>	<input type="checkbox"/>	-		Default	%	%			%	<input type="checkbox"/>

### Replenishment Change Parameters View - Default Profile Measures

The Replenishment Change Parameters view contains the following measures.

#### Chg. Enable

Change Enable is an editable measure used to enable or disable a replenishment change parameter. Each row (or list) represents a different replenishment change parameter.

#### Chg. Valid

Change Valid is a calculated measure used to indicate if the set up of the replenishment change parameter is valid or not. For example, if the replenishment status is kept as default and no ROL and/or RUTL change percentage are indicated then the replenishment change parameter is not valid for the engine.

#### Chg. Desc.

Change Description is a calculated measure used to indicate the replenishment change parameter description. The description is calculated based on the replenishment change parameter user-defined description and the replenishment change parameter set up selected by you.

#### Chg. User Desc.

Change User Description is an editable measure used to enter a user-defined replenishment change parameter description. The final replenishment change parameter description takes the user-defined description into consideration. The entered value must not contain a colon punctuation mark (:).

#### Repl. Status



Replenishment Status is an editable measure that allows you to override the replenishment status. The valid values are: Default : Option to not change the replenishment status and keep the system generated replenishment status.

- **On** — Option to force the replenishment to turn on the replenishment
- **Off**— Option to force the replenishment to turn off the replenishment

#### **ROL Chng %**

Reorder Level Change Percentage is an editable measure used that allows you to increase or decrease the system generated ROL value by the percentage value set in this measure. When the ROL should be increase then enter a positive value. When the ROL should be decreased then enter a negative value.

#### **RUTL Chng %**

Reorder Up to Level Change Percentage is an editable measure used that allows you to increase or decrease the system generated RUTL value by the percentage value set in this measure. When the RUTL should be increase then enter a positive value. When the RUTL should be decreased then enter a negative value.

#### **Rule Chg. Count**

Rule Change Count is a calculated measure used to display the total number of rules that are using the replenishment change parameter.

#### **PL Change Count**

Product and Location Change Count is a calculated measure used to display the total number of product and location combinations that associated with the replenishment change parameter.

#### **PL Change %**

Product and Location Change Percentage is a calculated measure used to indicate, in percentage, how much the product and location combinations associated with the replenishment change parameter represents in the total of product and location combinations with a lifecycle phase value. The measure is calculated as:

**Figure 20-21 Calculation**

$$100 * \frac{PLChangeCount}{AllPLCount}$$

#### **Chg. User Filter**

Change User Filter is an editable measure used to select the replenishment change parameter to filter the views by the selected replenishment change parameter. This measure is used by the **Run Filter** action button responsible to calculate the filters applied to the views within the Replenishment Parameters Rules workspace.

## Default Replenishment Parameters View

The Default Replenishment Parameters view allows you to set up the default replenishment strategies.

**Figure 20-22 Default Replenishment Parameters View**

Location	Default MCQ Units	Default Min Qty Units	Default Max Qty Units
1000 Web			
1001 Atlanta			
1002 Dallas			
1003 Boston			
1004 New York			
1005 Philadelphia Outlet			
1006 Chicago			
1007 Minneapolis			
1008 St. Louis			
1009 Albuquerque			
1010 Los Angeles			
1023 Seattle			
1024 Portland			
1025 Boise			
1026 Billings			

### Default Replenishment Parameters View - Default Profile Measures

The Default Replenishment Parameters view contains the following measures.

#### Default MCQ Units

Default Minimum Credible Quantity Units is an editable measure used to define the default Minimum Credible Quantity for the product and location combination.

#### Default Min Qty Units

Default Minimum Quantity Units is an editable measure used to define the default the minimum amount of stock desired when the ROL method is set to Min Quantity.

#### Default Max Qty Units

Default Max Quantity Units is an editable measure used to define the default maximum amount of stock desired when the RUTL method is set to Max Quantity.

## Inventory Plan Parameters Step

This step contains this view, [Inventory Plan Parameters View](#).

## Inventory Planning Parameters Key Concept

Use Inventory planning parameters to generate the time-phased inventory planning. Inventory parameters specify the System Minimum (which is the reorder level) and the System Maximum (which is the reorder up to level) methods along with the associated parameters is used in generating the time phased plans.

- **System Minimum (ROL)** is the inventory level that determines whether an order for replenishment should be placed at point of receipting week. At the point of receipting week, if the stock levels are less than the System Minimum, then an order for replenishment is placed, otherwise it is ignored until the next cycle.
- **System Maximum (RUTL)** is the target inventory level. While the replenishment point in time generates the orders at the system date. The time-phased inventory planning provides you with a weekly view on the inventory and the orders to be placed (the inventory plan is a projection based on current point in time network and product lifecycle status).

### Time-Phased Replenishment Methods

IPOCS-Lifecycle Allocation and Replenishment has the following replenishment methods for the System Minimum (ROL) and System Maximum (RUTL) calculations.

#### System Minimum (ROL)

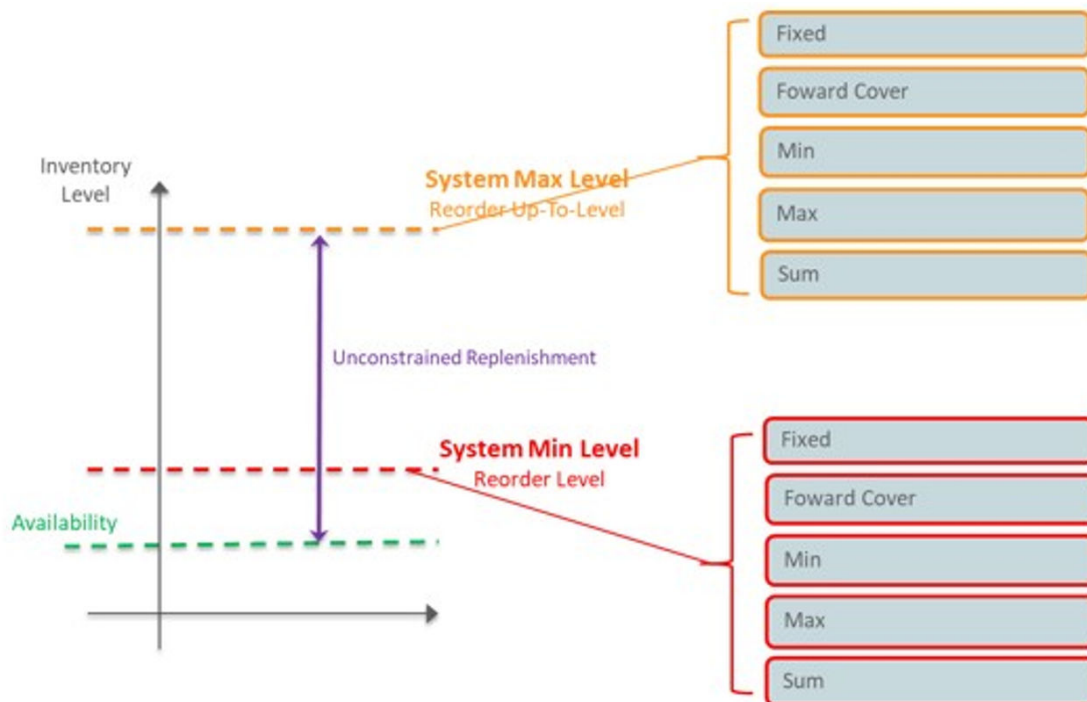
- **Fixed**  
This method uses the point-in-time replenishment values and does not calculate at every receipt opportunity. Either the ROL or RUTL values can be chosen from the point in time replenishment.
- **Forward Cover**  
This method calculates the value to cover the demand for the minimum number of days that should set by you in this method.
- **Min**  
This method uses the calculated value from the Fixed and Forward Cover methods and results is the lowest value between the two.
- **Max**  
This method uses the calculated value from the Fixed and Forward Cover methods and the result is the highest value between the two.
- **Sum**  
This method uses the calculated value from the Fixed and Forward Cover methods and the result is the sum both values.

#### System Maximum (RUTL)

- **Fixed**  
This method sets the value to a fixed user-defined value.
- **Forward Cover**  
This method calculates the value to cover the demand for the maximum number of days that should set by you in this method.
- **Min**  
This method uses the calculated value from the Fixed and Forward Cover methods and results is the lowest value between the two.
- **Max**  
This method uses the calculated value from the Fixed and Forward Cover methods and the result is the highest value between the two.
- **Sum**

This method uses the calculated value from the Fixed and Forward Cover methods and the result is the sum both values.

Figure 20-23 Time-Phased Replenishment Methods



## Inventory Plan Parameters View

The **Inventory Plan Parameters View**, under the **Inventory Plan Parameters** tab, allows you to set up all the possible Minimum and Maximum Level Methods for the Inventory Plan that can be used to set up the replenishment rules that will then be used by the engine to generate the time-phased replenishment.

Figure 20-24 Inventory Plan Parameters View

Inv. Plan. Enable	Inv. Plan. Valid	Inv. Plan. Desc.	Inv. Plan. User Desc.	Min Method	Min Fixed	Min Fixed Units	Min Fwd Cov. Dur (d)	Max Method	Max Fixed Units	Max Fwd Cov. Dur (d)
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Stores] Fix:RUTL Off	Stores	Fixed	RUTL		d			d
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Off] Off Off	Off	-	-		d			d
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[WH] Fwd.30d Fwd.120d	WH	Fwd Cov			30 d	Fwd Cov		120 d
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Reg DC] Fwd.28d Fwd.28d	Reg DC	Fwd Cov			28 d	Fwd Cov		28 d
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[PreAlloc] Off Off	PreAlloc	-	-		d			d
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Stores FwdCov] Fix:RUTL Fwd.7d	Stores FwdCov	Fixed	RUTL		d	Fwd Cov		7 d
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Mid-Atlantic Stores FwdCov] Fwd.21d	Mid-Atlantic Stores	Fwd Cov			21 d	Fwd Cov		21 d
<input type="checkbox"/>	<input type="checkbox"/>	-	-	-	-		d			d
<input type="checkbox"/>	<input type="checkbox"/>	-	-	-	-		d			d
<input type="checkbox"/>	<input type="checkbox"/>	-	-	-	-		d			d
<input type="checkbox"/>	<input type="checkbox"/>	-	-	-	-		d			d
<input type="checkbox"/>	<input type="checkbox"/>	-	-	-	-		d			d
<input type="checkbox"/>	<input type="checkbox"/>	-	-	-	-		d			d
<input type="checkbox"/>	<input type="checkbox"/>	-	-	-	-		d			d
<input type="checkbox"/>	<input type="checkbox"/>	-	-	-	-		d			d

## Inventory Plan Parameters View - Default Profile Measures

The Inventory Plan Parameters view contains the following measures.

### Inv. Plan. Enable

Inventory Planning Enable is an editable measure used to enable or disable an inventory planning parameter. Each row (or list) represents a different inventory planning parameter.

### Inv. Plan. Valid

Inventory Planning Valid is a calculated measure used to indicate if the set up of the inventory planning parameter is valid or not. An inventory planning parameter is considered valid if it is enabled.

### Inv. Plan. Desc.

Inventory Planning Description is a calculated measure used to indicate the inventory planning parameter description. The description is calculated based on the inventory planning parameter user-defined description and the inventory planning parameter set up selected by you.

### Inv. Plan. User Desc.

Inventory Planning User Description is an editable measure used to enter a user-defined inventory planning parameter description. The final inventory planning parameter description takes the user-defined description into consideration. The entered value must not contain a colon punctuation mark (:).

### Min Method

Minimum Method is an editable measure used to select the method to calculate the System Minimum (which is the reorder level) value. The valid values are:

- **Fixed**  
When this option is selected, then the point-in-time replenishment is used for the calculation and in the measure Min Fixed.
- **Forward Cover**  
When this option is selected, then the calculation calculates the demand to cover the amount of stock required for the number of days indicated in the measure Min Fwd Cov. Dur (d).
- **Min**  
When this option is selected, then the calculation sets the value to the minimum value resulted from the Fixed and Forward Cover methods.
- **Max**  
When this option is selected, then the calculation sets the value to the maximum value resulted from the Fixed and Forward Cover methods.
- **Sum**  
When this option is selected, then the calculation sets the value to the sum of the values resulted from the Fixed and Forward Cover methods.

### Min Fixed

Minimum Fixed is an editable measure used to select how the Fixed method calculates the System Minimum (which is the reorder level) value. The valid values are:

- -  
When this option is selected the result is set to the value in the measure Min Fixed Units.
- **ROL**  
When this option is selected the result is set to the ROL value from the point-in-time replenishment.
- **RUTL**  
When this option is selected the result is set to the RUTL value from the point-in-time replenishment.

#### **Min Fixed Units**

Minimum Fixed Units is an editable measure used to define the minimum fixed quantity to be used when the Min Method is Fixed and the Min Fixed is -.

#### **Min Fwd Cov. Dur (d)**

Minimum Fwd Cover Duration (day) is an editable measure used to define the minimum number of days of cover to be used when the Min Method is Forward Cover.

#### **Max Method**

Maximum Method is an editable measure used to select the method to calculate the System Maximum (which is the reorder up-to level) value. The valid values are:

- **Fixed**  
When this option is selected the calculation sets it to the value in the measure Max Fixed Units.
- **Forward Cover**  
When this option is selected, then the calculation calculates the demand to cover the amount of stock required for the number of days indicated in the measure Max Fwd Cov. Dur (d).
- **Min**  
When this option is selected, then the calculation sets the value to the minimum value resulted from the Fixed and Forward Cover methods.
- **Max**  
When this option is selected, then the calculation sets the value to the maximum value resulted from the Fixed and Forward Cover methods.
- **Sum**  
When this option is selected, then the calculation sets the value to the sum of the values resulted from the Fixed and Forward Cover methods.

#### **Max Fixed Units**

Maximum Fixed Units is an editable measure used to define the maximum fixed quantity to be used when the Max Method is Fixed.

#### **Max Fwd Cov. Dur (d)**

Maximum Fwd Cover Duration (day) is an editable measure used to define the maximum number of days of cover to be used when the Max Method is Forward Cover.

#### **Rule Ivp. Count**

Rule Inventory Planning Count is a calculated measure used to display the total number of rules that are using the inventory planning parameter.

#### **PL Ivp. Count**

Product and Location Inventory Planning Count is a calculated measure used to display the total number of product and location combinations that associated with the inventory planning parameter.

#### **PL Ivp. %**

Product and Location Inventory Planning Percentage is a calculated measure used to indicate, in percentage, how much the product and location combinations associated with the inventory planning parameter represents in the total of product and location combinations with a lifecycle phase value. The measure is calculated as:

**Figure 20-25 Calculation**

$$100 * \frac{PLIvp. Count}{AllPLCount}$$

#### **Ivp. User Filter**

Inventory Planning User Filter is an editable measure used to select the inventory planning parameter to filter the views by the selected inventory planning parameter. This measure is used by the **Run Filter** action button responsible to calculate the filters applied to the views within the Replenishment Parameters workspace.

## Constraint Parameters Step

This step contains these views:

- [Constraint Parameters View](#)
- [Default Store Priority View](#)

## Replenishment Constraint Parameters Concept

Replenishment Constraint Parameters allows you to set up parameters to indicate to the replenishment engine how to ration the stock when there is a stock constraint (for example, shortage). When facing stock shortages, the engine needs to adapt and fulfil the remaining stock to the stores in a way that ensures that the highest probability of sales is covered.

Figure 20-26 Example of a Replenishment Constraint



Rationing constrained stock is not solely based on store priority; allocating to the biggest (most important) stores can create missed sales. The replenishment engine approaches rationing based on the concept of layers. It tries to fulfill the most important on all stores requiring stock (using the store priority) before moving to the next layer. In this manner, the replenishment engine maximizes both service levels and the ability to sell.

The following available layers within IPOCS-Lifecycle Allocation and Replenishment are listed from the highest priority to the lowest priority:

- Customer Orders
- Display Quantity
- Minimum Credible Quantity
- Target Stock - Reorder Level (ROL)
- Target Stock - Reorder Up-To Level (RUTL)
- Target Stock - Pack
- Target Stock - Push

Figure 20-27 Example of Rationing based on Layers





As illustrated in the previous image the engine prioritizes the Store 3 despite the fact it is not the store with the higher priority. However, the Store 3 is where the layer with the higher priority needs to be fulfilled first. Once that layer is fulfilled, the engine moves to the stores the next layer with more priority needs to be fulfilled and so on until the available stock is distributed. Note that if there are two stores for the same layer priority to be fulfilled then the store priority is used.

## Constraint Parameter View

The replenishment engine utilizes constraint parameters to define the allocation of stock by changing the priorities of the destination location and/or changing the layer of allocation to fulfill. You may also set the destination location to active or not and the source location to constrained or unconstrained.

**Figure 20-28 Constraint Parameters View**

Cstr. Enable	Cstr. Valid	Cstr. Desc.	Cstr. User Desc.	Avail. Constr. (Src)	Src. Avail. (Src)	Src. Avail. (Src) Dur (d)	Rpl. Active (Dst)	Fulfill Till Layer (Dst)	SubLayer (Dst)	Ration. Prio (Dst)	Assign Pack (Dst)
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Warehouse] Repl.On Prio.Default Avail.On Till.Pack	Warehouse	<input checked="" type="checkbox"/>	OH+IT+OO	d	<input checked="" type="checkbox"/>	Pack	1		Both
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Stores] Repl.On Prio.Default Avail.On Till.Pack	Stores	<input checked="" type="checkbox"/>	OH+IT+OO	d	<input checked="" type="checkbox"/>	Pack	1		Both
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[OH] Repl.On Prio.Default Avail.Off	Off	<input type="checkbox"/>	OH	d	<input checked="" type="checkbox"/>	Pack	1		Both
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Over] Repl.On Prio.5 Avail.On Till.Pack	Over	<input checked="" type="checkbox"/>	OH	d	<input checked="" type="checkbox"/>	Pack	1	5.00	Both
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Under] Repl.On Prio.0 Avail.On Till.Pack	Under	<input checked="" type="checkbox"/>	OH	d	<input checked="" type="checkbox"/>	Pack	1	0.00	Both
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[Stop] Repl.Off Avail.On Till.Pack	Stop	<input checked="" type="checkbox"/>	OH	d	<input type="checkbox"/>	Pack	1		Both
<input type="checkbox"/>	<input type="checkbox"/>	-		<input checked="" type="checkbox"/>	OH	d	<input checked="" type="checkbox"/>	Pack	1		Both
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Constraint User Description is an editable measure used to enter a user-defined replenishment constraint parameter description. The final replenishment constraint parameter description takes the user-defined description into consideration. The entered value must not contain a colon punctuation mark (:).

**Avail. Constr. (Src)**

Avail. Constraint (Source) is an editable measure used to enable or disable the constraint for the source location.

**Src. Avail. (Src)**

Source Avail. (Source) is an editable measure to select which stock units are used from the source locations. The valid values are:

- **OH**  
Option to use stock on hand as the available stock.
- **OH+IT**  
Option to use stock on hand plus the stock in transit as the available stock. OH+IT+OO :  
Option to use stock on hand plus the stock in transit plus the stock on-order as the available stock.

**Src. Avail. (Src) Dur (d)**

Source Avail. (Source) Duration (day) is an editable measure used to define the number of days to get the in-transit and on-order stock. This number of days is used to calculate the available stock at the source location, measure Src. Avail. (Src), when the in-transit and/or on-order option is selected.

**Rpl. Active (Dst)**

Replenishment Active (Distribute) is an editable measure used to enable or disable the replenishment for the destination location.

**Fulfill Till Layer (Dst)**

Fulfill Till Layer (Distribute) is an editable measure used to select the layer until which the engine should fulfill the demand at the destination location. You should select one of the following options:

- 1st layer = Customer Order
- 2nd layer = Display Quantity
- 3rd layer = Min Credible Quantity
- 4th layer = Reorder Level
- 5th layer = Reorder Up to Level
- 6th layer = Pack
- 7th layer = Push

**SubLayer (Dst)**

SubLayer (Distribute) is an editable measure used to define the sublayer at the destination location for each of the layers until the selected layer in the measure FulFill Till Layer (Dst). Use the | character to separate the number of sublayers between layers. For example, if the layer selected in the measure FulFill Till Layer (Dst) is the 5th layer = Reorder Up-To Level and the sublayers are as follows:

- Customer Order has one layer

- Display Quantity has two layers
- Min Cred Quantity has two layers
- ROL has two layers
- RUTL has two layers

Then the value for this measure is: **1|2|2|2|2**

#### **Ration. Prio (Dst)**

Ration Priority (Distribute) is an editable measure used to define a rationing priority for the destination locations.

#### **Assign Pack (Dst)**

Assign Pack (Distribute) is an editable measure to define pack types assigned for the destination locations. The valid values are:

- **Complex**  
Option to select pack which type is complex
- **Simple**  
Option to select pack which type is complex
- **Both**  
Option to select all pack types – simple and complex

#### **Min Pack Fill Rate 1 (Dst) %**

Minimum Pack Fill Rate 1 (Distribute) Percentage is an editable measure used to define the minimum pack fill rate percentage for first round of complex pack assignment.

#### **Min Pack Fill Rate 2 (Dst) %**

Minimum Pack Fill Rate 2 (Distribute) Percentage is an editable measure used to define the minimum pack fill rate percentage for second round of complex pack assignment.

#### **Rule Cst. Count**

Rule Constraint Count is a calculated measure used to display the total number of rules that are using the replenishment constraint parameter.

#### **PL Cst. Count**

Product and Location Constraint Count is a calculated measure used to display the total number of product and location combinations that associated with the replenishment constraint parameter.

#### **PL Cst. %**

Product and Location Constraint Percentage is a calculated measure used to indicate, in percentage, how much the product and location combinations associated with the replenishment constraint parameter represents in the total of product and location combinations with a lifecycle phase value. The measure is calculated as:

Figure 20-29 Calculation

$$100 * \frac{PLCst. Count}{AllPLCcount}$$

**Cst. User Filter**

Constraint User Filter is an editable measure used to select the replenishment constraint parameter to filter the views by the selected replenishment constraint parameter. This measure is used by the **Run Filter** action button responsible to calculate the filters applied to the views within the Replenishment Parameters workspace.

## Default Store Priority View

The **Default Store Priority View**, under the **Constraint Parameters tab**, allows you to set up the locations priority by product partition to be used by the rationing process.

Figure 20-30 Default Store Priority View

Product	Location	Footwear
1000	Web	3.00
1001	Atlanta	3.00
1002	Dallas	10.00
1003	Boston	3.00
1004	New York	3.00
1005	Philadelphia Outlet	3.00
1006	Chicago	10.00
1007	Minneapolis	10.00
1008	St. Louis	3.00
1009	Albuquerque	3.00
1010	Los Angeles	3.00
1023	Seattle	3.00
1024	Portland	3.00
1025	Boise	3.00
1026	Billings	3.00
1027	Denver	3.00

**Default Store Priority View - Default Profile Measures**

The Default Store Priority view contains the following measure.

**Default Ration. Prio**

Default Rationing Priority is an editable measure used to define the location's priority, for the selected product partition, to be used by the engine for the rationing.

## Rules Step

This step contains these views:

- [Rules View](#)
- [Conditions View](#)
- [SKU-LOC View](#)

## Rules Concept for the Replenishment Parameters Task

In a similar way to the Supply Chain Network workspace, IPOCS-Lifecycle Allocation and Replenishment provides a powerful engine that enables you to create a set of rules to apply all the set up completed, within the Replenishment Parameters Task (replenishment parameters, replenishment change parameters, replenishment constraint parameters and inventory planning parameters), down to the item and location levels. You can define multiple rules at higher-levels using product, location, and product-location combinations. The rule engine determines the correct set to apply a the lowest level of product and location combinations.

Rules allow you to specify the time frame for the rule (if applicable) and the rule priority. The rule priority allows the rule engine to choose the correct rule to be applied if a product and location combination fits in more than one replenishment parameter rule (higher the number, higher the priority). The rule start and end date are used by the engine to know if the rule should be considered or discarded. If the system date falls in the start date and end date (or rule dates are empty) then it is considered. Otherwise, it is discarded.

Following are two examples and illustrations of rules for the Replenishment Parameters task.

- **Rule 1**  
Should be configured to apply the Repl. Param 1, Change Param 1, Constraint Param 1, and Inv. Plan Param 1.
  - The scope of the rule group where it is being configured (for example, Sport Bag products and the country France).
  - The condition where the rule applies is for all locations and products in the scope where the product-location lifecycle phase attribute is *Discovery*.
- **Rule 2**  
Should be configured to apply the Repl. Param 2, Change Param 2, Constraint Param 2, and Inv. Plan Param 2.
  - The scope of the rule group where it is being configured (for example, Sport Bag products and the country France).
  - The condition where the rule applies is for all locations and products in the scope where the product-location lifecycle phase attribute is *Maturity*.

 **Note:**

The condition is used by the rule engine to apply the set up to the product and location combinations that match the condition within the rule scope. The rule scope is defined by the Product Groups and Location Groups associated with the rule's rule group.

Figure 20-31 Illustration for a Rule 1

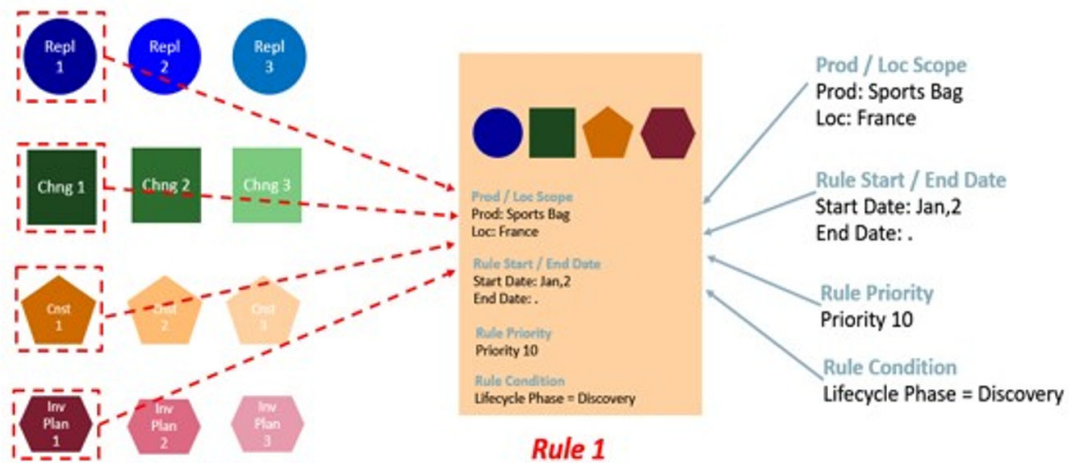
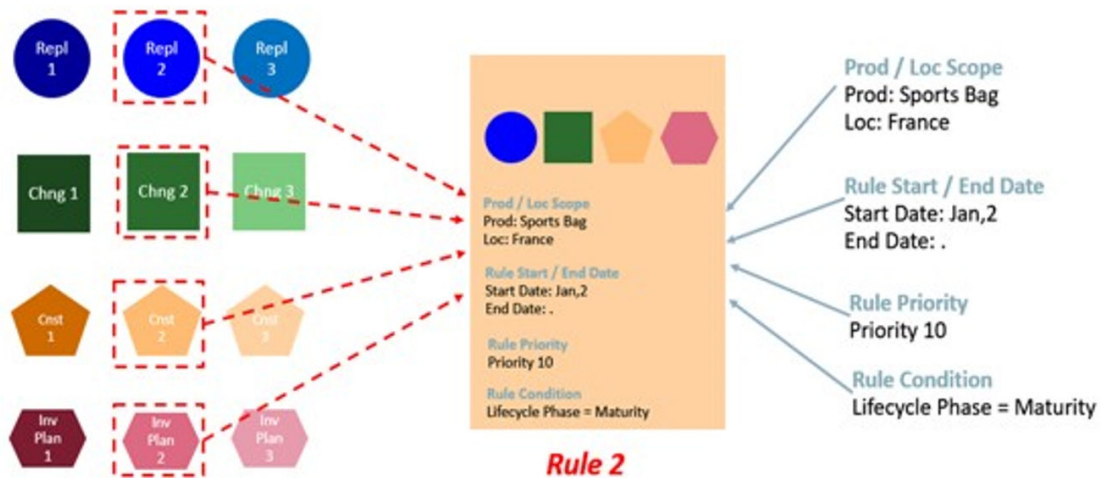


Figure 20-32 Illustration for a Rule 2



## Rules View

The **Rules View**, under the **Setup tab**, allows you to configure the rules by enabling them and defining the rule start date, end date and priority for each one. Once configured you can set up the rule by selecting the replenishment parameters, replenishment change parameters, replenishment constraint parameters and inventory planning parameters that the rule uses. The product and locations that applies the rule set up is based on the scope of the rule's rule group (Product Scope and Location Scope views) and the rule's condition that is set up and managed in the Conditions view.

Figure 20-33 Rules View

Rule	Rule User Filter	Rule Enable	Rule Level	Rule Condition	Rule Start Date	Rule End Date	Rule Prio	Rule Valid	PL Ass. Count	PL Ass. %	Rule Rpt.	PL Rpl. App. Count	PL Rpl. App. %	Rule Cr.
R.02.01		<input checked="" type="checkbox"/>	Local	(Item Group == A) AND (Lifecycle == Init) AND (LTY == Store)				<input checked="" type="checkbox"/>	252	0.6 %	[Seas. Init. A] MCQ.1 RUTLTS.Seas.30%	252	100.0 %	{Stores}
R.02.02		<input checked="" type="checkbox"/>	Local	(Item Group == B) AND (Lifecycle == Init) AND (LTY == Store)				<input checked="" type="checkbox"/>	708	1.7 %	[Seas. Init. B] MCQ.1 RUTLTS.Fix1	708	100.0 %	{Stores}
R.02.03		<input checked="" type="checkbox"/>	Local	(Item Group == C) AND (Lifecycle == Init) AND (LTY == Store)				<input checked="" type="checkbox"/>	252	0.6 %	[Seas. Init. C] MCQ.1 RUTLTS.Fix2	252	100.0 %	{Stores}
R.02.04		<input checked="" type="checkbox"/>	Local	(Item Group == D) AND (Lifecycle == Init) AND (LTY == Store)				<input checked="" type="checkbox"/>		%	[Seas. Init. D] MCQ.1 RUTLTS.Max			{Stores}
R.02.05		<input checked="" type="checkbox"/>	Local	(Item Performance == High) AND (Lifecycle == Dev) AND (LTY == Store)				<input checked="" type="checkbox"/>	285	0.7 %	[Seas. Dis. High] MCQ.1 RUTLTS.ST.15d	285	100.0 %	{Stores}
R.02.06		<input checked="" type="checkbox"/>	Local	(Item Performance == Medium) AND (Lifecycle == Dev) AND (LTY == Store)				<input checked="" type="checkbox"/>	388	0.9 %	[Seas. Dis. Medium] MCQ.1 RUTLTS.ST.7d	388	100.0 %	{Stores}
R.02.07		<input checked="" type="checkbox"/>	Local	(Item Performance == Low) AND (Lifecycle == Dev) AND (LTY == Store)				<input checked="" type="checkbox"/>	1,041	2.5 %	[Seas. Dis. Low] MCQ.1 RUTLTS.ST.3d	1,041	100.0 %	{Stores}
R.02.08		<input checked="" type="checkbox"/>	Local	(Style Types == Hot Item) AND (Lifecycle == Mat) AND (LTY == Store)				<input checked="" type="checkbox"/>	756	1.8 %	[Seas. Mat. Hot] MCQ.2 RUTLTS.SL.95%	756	100.0 %	{Stores}
R.02.09		<input checked="" type="checkbox"/>	Local	(Style Types == Average Item) AND (Lifecycle == Mat) AND (LTY == Store)				<input checked="" type="checkbox"/>	252	0.6 %	[Seas. Mat. Average] MCQ.1 RUTLTS.SL.90%	252	100.0 %	{Stores}
R.02.10		<input checked="" type="checkbox"/>	Local	(Style Types == Promo Item) AND (Lifecycle == Mat) AND (LTY == Store)				<input checked="" type="checkbox"/>	252	0.6 %	[Seas. Mat. Promo] MCQ.1 RUTLTS.SL.80%	252	100.0 %	{Stores}
R.02.11		<input checked="" type="checkbox"/>	Local	(Lifecycle == EoL) AND (LTY == Store)				<input checked="" type="checkbox"/>	1,022	2.5 %	[Seas. EoL] MCQ.0 RUTLTS.EoL.20%	1,022	100.0 %	{Stores}
R.02.12		<input checked="" type="checkbox"/>	Local	(LTY == Warehouse)				<input checked="" type="checkbox"/>	2,690	6.6 %	[WH] MCQ.0 RUTLTS.DoS.90d	1,614	60.0 %	{Warehch}
R.02.13		<input checked="" type="checkbox"/>	Local	(Store == w2001 Central Warehouse 1) AND (LTY == Warehouse)			1.00	<input checked="" type="checkbox"/>	538	1.3 %	[OH] MCQ.0 RUTLTS.MaxQ.0	538	100.0 %	{Warehch}
R.02.14		<input checked="" type="checkbox"/>	Local	(Lifecycle == Pre-Init) AND (LTY == Warehouse)				<input checked="" type="checkbox"/>		%	[WH Pre-Alloc] MCQ.0 RUTLTS.DoS.360d			{Warehch}

### Rules View - Measure Profiles

The Rules View contains the following profiles to change the measures that are visible in the view:

- Default**  
 This profile is used as default by the view. All the available or visible measures are listed and described in the section Measure: Default Profile.
- Change**  
 This profile displays a subset of measures from the default profile. It focuses on the rule and in the replenishment change parameters measures only. All other parameter related measures are left out of the visible measures.
- Constraint**  
 This profile displays a subset of measures from the default profile. It focuses on the rule and in the replenishment constraint parameters measures only. All other parameter related measures are left out of the visible measures.
- Inventory Plan**  
 This profile displays a subset of measures from the default profile. It focuses on the rule and in the inventory planning parameters measures only. All other parameter related measures are left out of the visible measures.
- Replenishment**  
 This profile displays a subset of measures from the default profile. It focuses on the rule and in the replenishment parameters measures only. All other parameter related measures are left out of the visible measures.

### Rules View - Default Profile Measures

The Rules View contains the following measures.

#### Rule User Filter

Rule User Filter is an editable measure used to select the rule to filter the views by the selected rule. This measure is used by the **Run Filter** action button responsible to calculate the filters applied to the views within the Replenishment Parameters workspace.

### **Rule Enable**

Rule Enable is an editable measure used to enable or disable a rule. Each row (or list) represents a different rule.

### **Rule Level**

Rule Level an editable measure used to select the level at what the engine will run the rule. The valid options are:

- **Global**  
In this option the rule engine will fully override the rule group scope that was set up in the Manage Rule Groups workspace and applies the rule to all valid product and location combinations.
- **All Prod**  
In this option the rule engine will partially override the rule group scope that was set up in the Manage Rule Groups workspace. The rule engine applies the rule to all valid product but for the locations in the rule group location's scope only.
- **All Loc**  
In this option, the rule engine will fully override the rule group scope that was set up in the Manage Rule Groups workspace. The rule engine applies the rule only to the products in the rule group product's scope and all valid locations.
- **Local**  
In this option the rule engine applies the rule to products and locations in the rule group scope defined in the Manage Rule Groups workspace.

### **Rule Condition**

Rule Condition is a calculated measure used to indicate the condition for which the rule is valid. The condition is the result of the set up completed in the Conditions view.

### **Rule Start Date**

Rule Start Date is an editable measure used to define a start date for the rule (when the rule should become active). When the rule is valid, and the start date is empty then the rule engine applies it. When the rule is valid, and the start date is populated the rule engine will start to apply it only when the start date is reached.

### **Rule End Date**

Rule End Date is an editable measure used to define an end date for the rule (when the rule should become inactive). When empty, the rule engine assumes that the rule has no end date and if it is valid, then the rule engine applies it. When the rule is valid, and the end date is populated, the rule engine stops applying it starting from the defined date.

### **Rule Prio**

Rule Priority is an editable measure used to define the rule's priority. The higher the number the higher the priority of the rule is. This rule priority is important to the rule engine as it is used when rules overlap each other. The rule engine uses the rule priority to select which one to apply.

### **Rule Valid**



Rule Valid is a calculated measure used to indicate if the set up of the rule is valid or not. For example, if all replenishment parameters are missing then the rule is not valid for the rule engine. The engine needs at least one of them to be assigned for the rule to be considered as valid.

**PL Ass. Count**

Product and Location Associated Count is a calculated measure used to display the total number of product and location combinations that are associated with the rule based on the rule's condition.

**PL Ass. %**

Product and Location Associated Percentage is a calculated measure used to indicate, in percentage, how much the product and location combinations, where the rule is applicable, represent in the total of product and location combinations within the rule group scope. The measure is calculated as:

**Figure 20-34 Calculation**

$$100 * \frac{PLAss.Count}{AllPLCount}$$

**Rule Rpl.**

Rule Replenishment is an editable measure for the you to select the replenishment parameter to be applied by the rule. This measure is a picklist populated with all valid replenishment parameters that were set up in the Replenishment Parameters view.

**PL Rpl. App. Count**

Product and Location Replenishment Applied Count is a calculated measure used to display the total number of product and location combinations that applies this rule's replenishment parameter. The calculation takes into account all the valid rules where the product and location combinations fall into and based on the priority calculates the count of product and location that applies the selected replenishment parameter.

**PL Rpl. App. %**

Product and Location Replenishment Applied Percentage is a calculated measure used to indicate, in percentage, how much the product and location combinations, where the rule's replenishment parameter is applicable, represent in the total of product and location combinations within the rule group scope. The measure is calculated as:

**Figure 20-35 Calculation**

$$100 * \frac{PLRpl.App.Count}{AllPLCount}$$

**Rule Cst.**

Rule Constraint is an editable measure used to select the replenishment constraint parameter to be applied by the rule. This measure is a picklist populated with all valid replenishment constraint parameters that were set up in the Constraint Parameters view.

**PL Cst. App. Count**

Product and Location Constraint Applied Count is a calculated measure used to display the total number of product and location combinations that applies this rule's replenishment constraint parameter. The calculation takes into account all the valid rules where the product and location combinations fall into and based on the priority calculates the count of product and location that applies the selected replenishment constraint parameter.

**PL Cst. App. %**

Product and Location Constraint Applied Percentage is a calculated measure used to indicate, in percentage, how much the product and location combinations, where the rule's replenishment constraint parameter is applicable, represent in the total of product and location combinations within the rule group scope. The measure is calculated as:

**Figure 20-36 Calculation**

$$100 * \frac{PLCst. App. Count}{AllPLCount}$$

**Rule Chg.**

Rule Change is an editable measure used to select the replenishment change parameter to be applied by the rule. This measure is a picklist populated with all valid replenishment change parameters that were set up in the Replenishment Change Parameters.

**PL Chg App. Count**

Product and Location Change Applied Count is a calculated measure used to display the total number of product and location combinations that applies this rule's replenishment change parameter. The calculation takes into account all the valid rules where the product and location combinations fall into and based on the priority calculates the count of product and location that applies the selected replenishment change parameter.

**PL Chg App. %**

Product and Location Change Applied Percentage is a calculated measure used to indicate, in percentage, how much the product and location combinations, where the rule's replenishment change parameter is applicable, represent in the total of product and location combinations within the rule group scope. The measure is calculated as:

**Figure 20-37 Calculation**

$$100 * \frac{PLChg. App. Count}{AllPLCount}$$

**Rule Ivp.**

Rule Inventory Planning is an editable measure used to select the inventory planning parameter to be applied by the rule. This measure is a picklist populated with all valid inventory planning parameters that were set up in the Inventory Plan Parameters view.

**PL Ivp. App. Count**

Product and Location Inventory Planning Applied Count is a calculated measure used to display the total number of product and location combinations that applies this rule's inventory planning parameter. The calculation takes into account all the valid rules where the product and location combinations fall into and based on the priority calculates the count of product and location that applies the selected inventory planning parameter.

**PL Ivp. App. %**

Product and Location Inventory Planning Applied Percentage is a calculated measure used to indicate, in percentage, how much the product and location combinations, where the rule's inventory planning parameter is applicable, represent in the total of product and location combinations within the rule group scope. The measure is calculated as:

**Figure 20-38 Calculation**

$$100 * \frac{PLIvp. App. Count}{AllPLCount}$$

**Copy & Paste**

Copy and Paste is an editable measure to select whether the rule is the source or destination for the copy paste rules functionality (Copy-Paste Rules). Valid values are:

- **Copy**  
Option to select in the rule to be used as the source of the copy.
- **Paste**  
Option to select in the rule to be used as destination of the copy.
- -  
Option selected to clear the measure.

 **Note:**

Only one rule should be selected as a source, **Copy** but multiple rules can be selected as a destination, **Paste**.

## Conditions View

This view allows you to define the conditions for the rules based in product, location, and product-location attributes. A rule condition is what allows the engine to find the product and location combinations where the rule is applicable.

**Figure 20-39 Conditions View**

Measure	Cond Attribute	Within Cond Op	Cond Value	Cond Value String	Cond Value Measure	Cond Value Date	Between Cond Op	Cond Order	Cond Group	Validation Result	Invalid Flag	Valid Flag
Rule Condition												
condition 01	Department	==	0.00	Missy			AND	1	1	(dept == missy and	<input type="checkbox"/>	<input checked="" type="checkbox"/>
condition 02	Class	!=	0.00	Missy Sweaters				2	1	cls != missy_sweaters)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
condition 03			0.00					3	1		<input type="checkbox"/>	<input type="checkbox"/>
condition 04			0.00					4	1		<input type="checkbox"/>	<input type="checkbox"/>

### Conditions View - Default Profile Measures

The Conditions view contains the following measures.

#### Condition Attribute

The Condition Attribute measure allows you to select the attribute for the condition, The attributes for the rules are assigned in the Attribute Review workspace.

#### Within Cond Op

The Within Cond Op measure allows you to specify the operator to be used inside the condition.

**Table 20-2 Within Cond Op Measure Available Operators**

Possible Operators	Descriptions	Example
==	Checks if the attribute value is equal with the Condition Value	brand == Private Label
!=	Checks if the attribute value is different from the Condition Value	average sales != 0
>	Checks if the attribute value is larger than the Condition Value	Average sales >5
>=	Checks if the attribute value is larger or equal to the Condition Value	
<	Checks if the attribute value is less than the Condition Value	Standard deviation of sales <6
<=	Checks if the attribute value is less or equal to the Condition Value	
contain		
not contain		
match		
not match		

#### Cond Value

The Cond Value measure is used when the type of the attribute is numeric. Example: average sales > 10

### Cond Value String

The Cond Value String measure is used when the type of the attribute is a string. Example:  
brand == Private Label

### Cond Value Measure

The value of the Cond Value measure is a measure name, which is populated by an expression that let's you refine the condition value. For instance private label versus non-private label.

This measure is used when you want to refine the condition value.

For instance, for the coffee items, except Private Label, you want to assign items to the rule that sell more than 50 per week. For Private Label items you may want the value to be 100. You need to populate your Condition measure with a value of 100 for all Private Label items, and the rest of the coffee items with 50.

### Cond Value Date

The Cond Value Date measure is used when the type of the attribute is a date. Example: today >= 02/30/2024"

### Between Cond Op

Within a rule there can be multiple conditions and also multiple condition groups. This is specified in the Cond Group measure. Conditions with the same Cond Group value belong to the same group.

For example, if a rule has 4 conditions, Conditions 1 and 2 can belong to condition group 1, and conditions 3 and 4 can belong to the condition group 2. Also, the Cond Order measure gives the ranking of the conditions inside the group.

The following table is an assumed use case:

**Table 20-3 Between Cond Op Assumed Use Case**

Condition	Between Con Op	Cond Order	Cond Group
Condition 1	AND	1	1
Condition 2	OR	2	1
Condition 3	OR	3	2
Condition 4		4	2

The value for the Between Cond Op can be the logical operators AND or OR.

The conditions are evaluated first inside a condition group and then between groups. In the previous case, the resulting condition is:

(Condition 1 **AND** Condition 2) **OR** (Condition 3 **OR** Condition 4)

Here is an example where all conditions belong to the same condition group:

**Table 20-4 Example: All Conditions Belong to the Same Condition Group**

Condition	Between Con Op	Cond Order	Cond Group
Condition 1	AND	1	1
Condition 2	OR	2	1

**Table 20-4 (Cont.) Example: All Conditions Belong to the Same Condition Group**

Condition	Between Con Op	Cond Order	Cond Group
Condition 3	OR	3	1
Condition 4		4	1

The resulting condition for the rule is given by:

Condition 1 **AND** Condition 2 **OR** Condition 3 **OR** Condition 4

Note that the conditions are evaluated in the order given by the values in the Cond Order measure.

### Cond Order

The Cond Order measure displays the order in which conditions are evaluated, with independently or inside a condition group.

### Cond Group

The Cond Group measure allows you to group conditions. This is useful when you want to evaluate conditions in a two-step process. First, the conditions are evaluated inside groups. In the second step, the group results are evaluated .

### Validation Result

The Validation Result measure displays the condition expressions that are validated.

### Invalid Flag

The Invalid Flag measure indicates if a condition is invalid.

### Valid Flag

The Valid Flag measure indicates if a condition is valid.

## SKU-LOC View

The **SKU-LOC View**, under the **Review tab**, allows you to review the results of running the rule engine calculation based on the rules set up in the workspace. In this view you can review to the results at the lowest level, item and location levels, and can also create exceptions, at the item-location level, to overwrite the replenishment set up calculated by the rule engine (for example, a particular item and location that should apply a different replenishment parameter from all the other item locations in the same rule).

Figure 20-40 SKU-LOC View

### SKU-LOC View - Measure Profiles

The SKU-LOC View contains the following profiles to change the measures that are visible in the view:

- Default**

This profile is used as default by the view. All the available/visible measures are listed and described in the section Measure: Default Profile.
- Change**

This profile displays a subset of measures from the default profile. It focuses on the replenishment change parameters measures only. All other parameter related measures are left out of the visible measures.
- Constraint**

This profile displays a subset of measures from the default profile. It focuses on the replenishment constraint parameters measures only. All other parameter related measures are left out of the visible measures.
- Inv Plan**

This profile displays a subset of measures from the default profile. It focuses on the inventory planning parameters measures only. All other parameter related measures are left out of the visible measures. Replenishment: This profile displays a subset of measures from the default profile. It focuses on the replenishment parameters measures only. All other parameter related measures are left out of the visible measures.

### SKU-LOC View - Default Profile Measures

The SKU-LOC View contains the following measures.

#### PL User Filter

Product and Location User Filter is an editable measure used to select the product and location combinations to filter the views by the selected the product and location combinations. This measure is used by the **Run Filter** action button is responsible to calculate the filters applied to the views within the Supply Chain Network workspace.

**All PL**

All Product and Location is a calculated measure used to indicate if a product and location combination is valid or not. If the combination is valid for a lifecycle phase, it displays as selected.

**PL Valid**

Product and Location Valid is a calculated measure used to indicate if a product and location combination has a valid rule from where the rule engine calculates the replenishment parameters. If the product-location combination is valid, it displays as selected.

**PL Rpl.**

Product and Location Replenishment is a calculated measure used to indicate the replenishment parameter applied to the product and location combination. The replenishment parameter displayed is the one calculated by the rule engine using the replenishment rules set up.

**Ovr Rpl.**

Over Replenishment is an editable measure that allows you to create exceptions at the item-location level. You can select the replenishment parameter to override the assigned replenishment parameter (measure PL Rpl.). This measure is a picklist populated with all valid replenishment parameter that were set up in the Replenishment Parameters view.

**PL Rpl. Rule Count**

Product and Location Replenishment Rule Count is a calculated measure used to indicate the total number of replenishment parameters that are assigned to the product and location combination based on the Rules set up. Note that a product and location combination can only have one replenishment parameter active. The one that is active is the one from the rule with the highest priority or the user-exception override.

**PL Rpl. Prio**

Product and Location Replenishment Priority is a calculated measure used to indicate the priority of the rule from where the replenishment parameter was calculated for the product and location combination.

**PL Rpl. End Date**

Product and Location Replenishment End Date is a calculated measure used to indicate the end date of the rule from where the replenishment parameter was calculated for the product and location combination.

**PL Change**

Product and Location Change is a calculated measure used to indicate the replenishment change parameter applied to the product and location combination. The replenishment change parameter displayed is the one calculated by the rule engine using the replenishment rules set up.

**Ovr Change**

Over Change is an editable measure used that allows you to create exceptions at the item-location level. You can select the replenishment change parameter to override the assigned replenishment change parameter (measure PL Change). This measure is a picklist populated with all valid replenishment change parameters that were set up in the Replenishment Change Parameters view.

**PL Chg. Rule Count**



Product and Location Change Rule Count is a calculated measure used to indicate the total number of Replenishment change parameters that are assigned to the product and location combination based on the Rules set up. Note that a product and location combination can only have one replenishment change parameter active. The active Replenishment change parameter is either the one from the rule with the highest priority or the user-exception override.

**PL Chg. Prio**

Product and Location Change Priority is a calculated measure used to indicate the priority of the rule from where the replenishment change parameter was calculated for the product and location combination.

**PL Chg. End Date**

Product and Location Change End Date is a calculated measure used to indicate the end date of the rule from where the replenishment change parameter was calculated for the product and location combination.

**PL Cst.**

Product and Location Constraint is a calculated measure used to indicate the replenishment constraint parameter applied to the product and location combination. The replenishment change parameter displayed is the one calculated by the rule engine using the replenishment rules set up.

**Ovr Cst.**

Over Constraint is an editable measure used that allows you to create exceptions at the item-location level. You can select the replenishment constraint parameter to override the assigned replenishment constraint parameter (measure PL Cst.). This measure is a picklist populated with all valid replenishment constraint parameters that were set up in the Constraint Parameters view.

**PL Cst. Rule Count**

Product and Location Constraint Rule Count is a calculated measure used to indicate the total number of replenishment constraint parameters that are assigned to the product and location combination based on the Rules set up. Note that a product and location combination can only have one replenishment constraint parameter active. The active Replenishment constraint parameter is either the one from the rule with the highest priority or the user-exception override.

**PL Cst. Prio**

Product and Location Constraint Priority is a calculated measure used to indicate the priority of the rule from where the replenishment constraint parameter was calculated for the product and location combination.

**PL Cst. End Date**

Product and Location Constraint End Date is a calculated measure used to indicate the end date of the rule from where the replenishment constraint parameter was calculated for the product and location combination.

**PL Ivp.**

Product and Location Inventory Planning is a calculated measure used to indicate the inventory planning parameter applied to the product and location combination. The inventory planning parameter displayed is the one calculated by the rule engine using the replenishment rules set up.

**Ovr Ivp.**

Over Inventory Planning is an editable measure used that allows you to create exceptions at the item-location level. You can select the inventory planning parameter to override the assigned inventory planning parameter (measure PL Ivp.). This measure is a picklist populated with all valid inventory planning parameters that were set up in the Inventory Plan Parameters view.

**PL Ivp. Rule Count**

Product and Location Inventory Planning Rule Count is a calculated measure used to indicate the total number of inventory planning parameters that are assigned to the product and location combination based on the Rules set up. Note that a product and location combination can only have one inventory planning parameter active. The active inventory planning parameter is either the one from the rule with the highest priority or the user-exception override.

**PL Ivp. Prio**

Product and Location Inventory Planning Priority is a calculated measure used to indicate the priority of the rule from where the inventory planning parameter was calculated for the product and location combination.

**PL Ivp. End Date**

Product and Location Inventory Planning End Date is a calculated measure used to indicate the end date of the rule from where the inventory planning parameter was calculated for the product and location combination.

**Default MCQ Units**

Default Minimum Credible Quantity Units is an editable measure used to define the default Minimum Credible Quantity for the product and location combination.

**Min Cred. Qty @ Today Units**

Minimum Credible Quantity at Today Units is a calculated measure used to indicate the Minimum Credible Quantity applied to the product and location combination at the system date. The Minimum Credible Quantity displayed is the one calculated by the rule engine using the replenishment rules set up. In case there is no Minimum Credible Quantity from the replenishment rule set up the value from the measure Default MCQ Units is used instead.

**ROL Meth. @ Today**

Reorder Level Method at Today is a calculated measure used to indicate the ROL method applied to the product and location combination at the system date. The ROL method displayed is the one calculated by the rule engine using the replenishment rules set up.

**Default Min Qty Units**

Default Minimum Quantity Units is an editable measure used to define the default the minimum amount of stock desired when the ROL method is set to Min Quantity.

**Min Qty @ Today Units**

Minimum Quantity at Today Units is a calculated measure used to indicate the ROL minimum quantity units applied to the product and location combination at the system date. The minimum quantity units displayed is the one calculated by the rule engine using the replenishment rules set up.

**Min TS @ Today Dur (d)**

Minimum Target Stock at Today Duration (day) is a calculated measure used to indicate the ROL minimum time supply (in days) applied to the product and location combination at the system date. The minimum time supply displayed is the one calculated by the rule engine using the replenishment rules set up.

**Volatility @ Today %**

Volatility at Today Percentage is a calculated measure used to indicate the Volatility % applied to the product and location combination at the system date. The Volatility % displayed is the one calculated by the rule engine using the replenishment rules set up.

**Tgt. SL @ Today %**

Target Service Level at Today Percentage is a calculated measure used to indicate the Target Service Level % applied to the product and location combination at the system date. The Target Service Level % displayed is the one calculated by the rule engine using the replenishment rules set up.

**ROL Sft. Time @ Today Dur (d)**

Reorder Level Safety Time at Today Duration (day) details the Reorder level safety time duration applicable today based on rules association and used in replenishment calculations where RUTL method is not Target Stock. The ROL level is determined as lead time + review time + ROL Sft Time @ Today Dur (d).

**RUTL Meth. @ Today**

Reorder Up to Level Method at Today is a calculated measure used to indicate the RUTL method applied to the product and location combination at the system date. The RUTL method displayed is the one calculated by the rule engine using the replenishment rules set up.

**Default Max Qty Units**

Default Maximum Quantity Units is an editable measure used to define the default maximum amount of stock desired when the RUTL method is set to Max Quantity.

**Max Qty @ Today Units**

Maximum Quantity at Today Units is a calculated measure used to indicate the RUTL maximum quantity units applied to the product and location combination at the system date. The maximum quantity units displayed is the one calculated by the rule engine using the replenishment rules set up.

**Max TS @ Today Dur (d)**

Maximum Target Stock at Today Duration (day) is a calculated measure used to indicate the RUTL maximum time supply (in days) applied to the product and location combination at the system date. The maximum time supply displayed is the one calculated by the rule engine using the replenishment rules set up.

**Tgt. DoS @ Today Dur (d)**

Tgt. DoS at Today Duration (day) is a calculated measure used to indicate the Target Days of Supply (in days) applied to the product and location combination at the system date. The Target Days of Supply displayed (and used by the Tgt DoS RUTL method) is the one calculated by the rule engine using the replenishment rules set up.

**TS Meth. @ Today**

Target Stock Method at Today is a calculated measure used to indicate the target stock method applied to the product and location combination at the system date (when the RUTL method is

target stock). The target stock method displayed is the one calculated by the rule engine using the replenishment rules set up.

**TS Sft. Time @ Today Dur (d)**

Target Stock Safety Time at Today Duration (day) is a calculated measure used to indicate the number of days for the stock safety applied to the product and location combination at the system date (to be used when the RUTL method is target stock). The value displayed is the one calculated by the rule engine using the replenishment rules set up.

**TS Seas. Fcst @ Today %**

Target Stock Seasonal Forecast at Today Percentage is a calculated measure used to indicate the percentage of the Seasonal Forecast applied to the product and location combination at the system date (to be used when the RUTL method is target stock). The value displayed is the one calculated by the rule engine using the replenishment rules set up.

**Order Rounding Threshold @ Today %**

Order Rounding Threshold at Today Percentage is a calculated measure used to indicate the percentage to round up the orders applied to the product and location combination at the system date. The value displayed is the one calculated by the rule engine using the replenishment rules set up.

**Repl. Status @ Today**

Replenishment Status at Today is a calculated measure used to indicate whether product and location combination at the system date is replenished or not. The value displayed is the one calculated by the rule engine using the replenishment rules set up.

**ROL Chng @ Today %**

Reorder Level Change at Today Percentage is a calculated measure used to indicate the percentage to increase or decrease the system generated ROL value applied to the product and location combination at the system date. The value displayed is the one calculated by the rule engine using the replenishment rules set up.

**RUTL Chng @ Today %**

Reorder Up to Level Change at Today Percentage is a calculated measure used to indicate the percentage to increase or decrease the system generated RUTL value applied to the product and location combination at the system date. The value displayed is the one calculated by the rule engine using the replenishment rules set up.

**Avail. Constr. (Src) @ Today**

Available Constraint (Source) at Today is a calculated measure used to indicate whether a constraint is enable or disable (at the source location) for the product and location combination at the system date. The value displayed is the one calculated by the rule engine using the replenishment rules set up.

**Src. Avail. (Src) @ Today**

Source Available (Source) at Today is a calculated measure used to indicate which stock units to be used from the source locations is applied to the product and location combination at the system date. The value displayed is the one calculated by the rule engine using the replenishment rules set up.

**Src. Avail. (Src) @ Today Dur (d)**

Source Available (Source) at Today Duration (day) is a calculated measure used to indicate the number of days to get the in-transit and on-order stock is applied to the product and location

combination at the system date. The value displayed is the one calculated by the rule engine using the replenishment rules set up.

**Rpl. Active (Dst) @ Today**

Replenishment Active (Distribution) at Today is a calculated measure used to indicate for the product and location combination at the system date if the location has the replenishment active or not. The value displayed is the one calculated by the rule engine using the replenishment rules set up.

**Fulfill Till Layer (Dst) @ Today**

Fulfill Till Layer (Distribution) at Today is a calculated measure used to indicate the layer applied to the product and location combination at the system date (layer until which the engine should fulfill the demand). The value displayed is the one calculated by the rule engine using the replenishment rules set up.

**SubLayer (Dst) @ Today**

SubLayer (Distribution) at Today is a calculated measure used to indicate the sublayers applied to the product and location combination at the system date. The value displayed is the one calculated by the rule engine using the replenishment rules set up.

**Default Ration. Prio**

Default Rationing Priority is an editable measure used to define the default rationing priority for the product and location combination.

**Ration. Prio (Dst) @ Today**

Rationing Priority (Distribution) at Today is a calculated measure used to indicate the rationing priority applied to the product and location combination at the system date. The value displayed is the one calculated by the rule engine using the replenishment rules set up. In case there is no rationing priority from the replenishment rule set up the value from the measure Default Ration Prio. is used instead.

**Assign Pack (Dst) @ Today**

Assign Pack (Distribution) at Today is a calculated measure used to indicate the pack types' assignment applied to the product and location combination at the system date. The value displayed is the one calculated by the rule engine using the replenishment rules set up.

**Min Pack Fill Rate 1 (Dst) @ Today %**

Minimum Pack Fill Rate 1 (Distribution) at Today Percentage is a calculated measure used to indicate the minimum pack fill rate percentage for first round of complex pack assignment applied to the product and location combination at the system date. The value displayed is the one calculated by the rule engine using the replenishment rules set up.

**Min Pack Fill Rate 2 (Dst) @ Today %**

Minimum Pack Fill Rate 2 (Distribution) at Today Percentage is a calculated measure used to indicate the minimum pack fill rate percentage for second round of complex pack assignment applied to the product and location combination at the system date. The value displayed is the one calculated by the rule engine using the replenishment rules set up.

**Min Method @ Today**

Minimum Method at Today is a calculated measure used to indicate the inventory planning method, to calculate the System Minimum value, applied to the product and location combination at the system date. The inventory planning method displayed is the one calculated by the rule engine using the replenishment rules set up.

**Min Fixed @ Today**

Minimum Fixed at Today is a calculated measure used to indicate how the Fixed inventory planning method calculates the System Minimum value for the product and location combination at the system date. The value displayed is the one calculated by the rule engine using the replenishment rules set up.

**Min Fixed @ Today Units**

Minimum Fixed at Today Units is a calculated measure used to indicate the minimum fixed quantity applied to the product and location combination at the system date (used when the Min Method @ Today is Fixed and the Min Fixed @ Today is -). The value displayed is the one calculated by the rule engine using the replenishment rules set up.

**Min Fwd Cov. @ Today Dur (d)**

Minimum Forward Cover at Today Duration (day) is a calculated measure used to indicate the minimum number of days of cover applied to the product and location combination at the system date (used when the Min Method @ Today is Forward cover). The value displayed is the one calculated by the rule engine using the replenishment rules set up.

**Max Method @ Today**

Maximum Method at Today is a calculated measure used to indicate the inventory planning method, to calculate the System Maximum value, applied to the product and location combination at the system date. The inventory planning method displayed is the one calculated by the rule engine using the replenishment rules set up.

**Max Fixed @ Today Units**

Maximum Fixed at Today Units is a calculated measure used to indicate the maximum fixed quantity applied to the product and location combination at the system date (used when the Max Method @ Today is Max). The value displayed is the one calculated by the rule engine using the replenishment rules set up.

**Max Fwd Cov. @ Today Dur (d)**

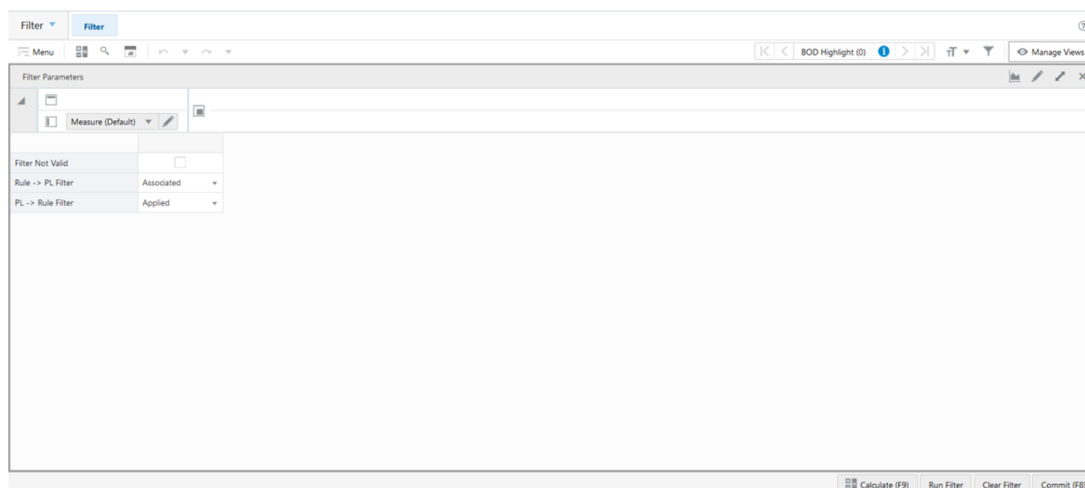
Maximum Forward Cover at Today Duration (day) is a calculated measure used to indicate the maximum number of days of cover applied to the product and location combination at the system date (used when the Max Method @ Today is Forward cover). The value displayed is the one calculated by the rule engine using the replenishment rules set up.

## Filter Step

This step contains this view, [Filter Parameters View](#).

## Filter Parameters View

The **Filter Parameters View**, under the **Filter tab**, allows you to set up the filter that can change the scope of the products and locations displayed in all relevant views under the Rules Step within the Repl. Param. Rules Workspace.

**Figure 20-41 Filter Parameters View****Filter Parameters View - Default Profile Measures**

The Filter Parameters view contains the following measures.

**Filter Not Valid**

Filter Not Valid is an editable measure to change the scope of the products and locations displayed in all relevant views under the Rules Step. If the measure is selected, the **Run Filter** action button is responsible to calculate the filters that only display non-valid product and location combinations. When clear the filter only displays valid product and location combinations. By default, the measure is clear. The measure PL Valid identifies whether or not a product and location combination is valid.

**Rule -> PL Filter**

Rule -> PL Filter is an editable measure to select how the filter should work in the SKU- LOC view. Valid values are:

- **Associated**

The view is filtered to display the product and location combinations that are associated with the rules selected in the Rules view (measure Rule User Filter). Note that a product and location combination can fit in more than one rule. When they fit in a rule they are associated regardless, if that rule is the actual one to be applied.

- **Applied**

The view is filtered to display the product and location combinations that apply the rules selected in the Rules view (measure Rule User Filter). The rule is consider as applied when the LIP CS Rule Engine sets the replenishment set up for the product and location combination based on the rule (for example, BOD, PLC, and so on).

**PL -> Rule Filter**

Product and Location -> Rule Filter is an editable measure to select how the filter should work in the Rules view. Valid values are:

- **Associated**

The view is filtered to display rules that are associated with the product and location combinations selected in the SKU-LOC view (measure PL User Filter). Note that a product

and location combinations can fit in more than one rule. When they fit in a rule they are associated regardless, if that rule is the actual one to be applied.

- **Applied**

The view is filtered to display rules that are associated with the product and location combinations selected in the SKU-LOC view (measure PL User Filter). The rule is considered as applied when the LIP CS Rule Engine sets the replenishment set up for the product and location combination based on the rule (for example, BOD, PLC, and so on).

 **Note:**

In the same way as in the Supply Chain Network workspace, the measure in this view is used by the **Replenishment Parameters Run Filter** action button to filter the relevant views within the Replenishment Parameters workspace.

## Replenishment Parameters Action Buttons

The Replenishment Parameters workspace has the following action buttons available:

- **Run Filter**

Use the **Run Filter** action button for applying the filters in the Rules views based on the filter set up completed within the workspace. For example, filter based on the User Filter measures.

- **Clear Filter**

Use the **Copy-Paste Exceptions** action button for removing all filters applied in the Rules views and clears all the User Filter measures within the workspace.

- **Calculate Rules**

Use the **Calculate Rules** action button for running the rules engine to calculate which rule's replenishment and inventory planning parameters set up would be applied to the product and location combination level and applying the rule's replenishment and inventory planning parameters set up down to the product and location combination level.

- **Duplicate Rule**

Use the **Duplicate Rule** action button to copy all the rules information from the rule selected as the source of the copy and paste it into all the rules selected as the destination of the copy. This action copies all the information in the Rules view and Conditions view.



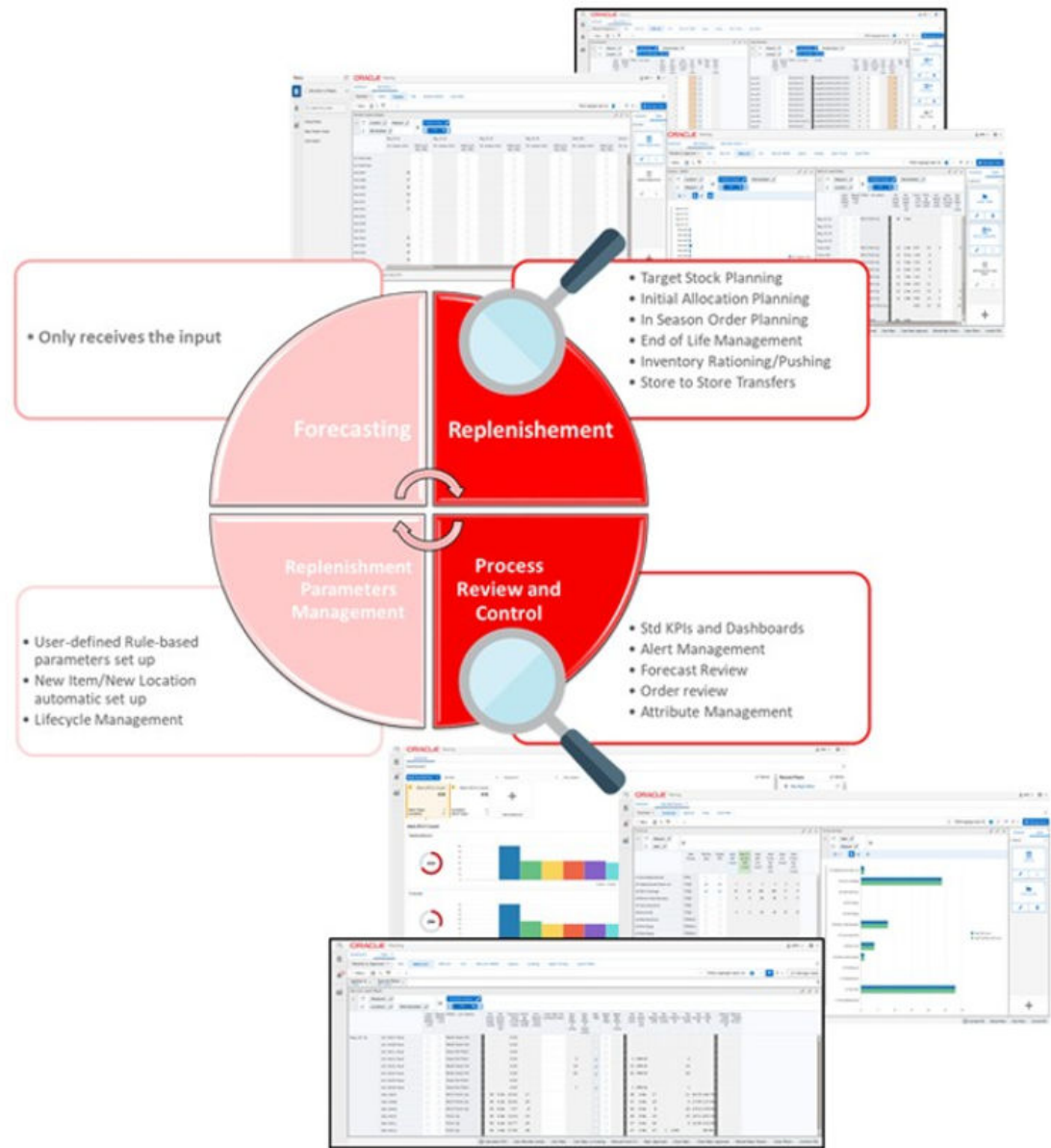
# 21

## Review and Approve

This chapter describes the functionality that allows you to review and approve the latest system-calculated point-in-time orders and time-phased orders. This is the workspace where you analyze the suggested replenishment and allocations and perform the necessary actions. The following are some examples of typical tasks to perform in this workspace.

- Future store opening or store closing impacts
- What-if scenarios to simulate changes in the replenishment parameters
- Review critical alerts and do the necessary amendments
- Approve orders that are not approved automatically due to critical alerts

Figure 21-1 Review and Approve Task



## Review and Approve Workspace, Steps, and Views

The following table lists the workspaces, steps, and views of the Review and Approve task.

Table 21-1 Review and Approve Workspace, Steps, and Views

Workspace	Step	Tab	Views
Review and Approve Workspace	Overview	To-Do List	Approval Status View
			To-Do List View
			Today View

**Table 21-1 (Cont.) Review and Approve Workspace, Steps, and Views**

Workspace	Step	Tab	Views
			User Filter View
	Review and Approve	By Prod	SKU Level (R and A) View
			SKU-LOC Level (R and A) View
			SKU-Source LOC Level (R and A) View
			VAR-LOC Level (R and A) View
			VAR-Source LOC Level (R and A) View
		By Location	LOC Level (R and A) View
			LOC-SKU Level (R and A) View
			LOC-VAR Level (R and A) View
			Source LOC-SKU Level (R and A) View
			Source LOC-VAR Level (R and A) View
		Space	Display Space by LOC (R and A) View
			Display Space by SKU (R and A) View
			Stockroom Space by LOC (R and A) View
			Stockroom Space by SKU (R and A) View
		Inventory Plan	Inventory Plan
	SKU-LOC Level (InvPlan) View		
	SKU-LOC-DAY Level (InvPlan) View		
	SKU-LOC-WEEK Level (InvPlan) View		
	SKU-Source LOC-WEEK Level (R and A) View		
	Rebalancing	Summary	Item-Location View
			Items View
			Locations View
			Parameters View
		Transfers	Item-Location View
			Items View
			Links View
			Locations View
			Parameters View
			Transfer Deficit Analysis View
	Manual Transfer	Allowed Transfer	Allowed Transfer View
		Deficit Surplus Analysis	Transfer Surplus Analysis View
			Transfer by Destination View

**Table 21-1 (Cont.) Review and Approve Workspace, Steps, and Views**

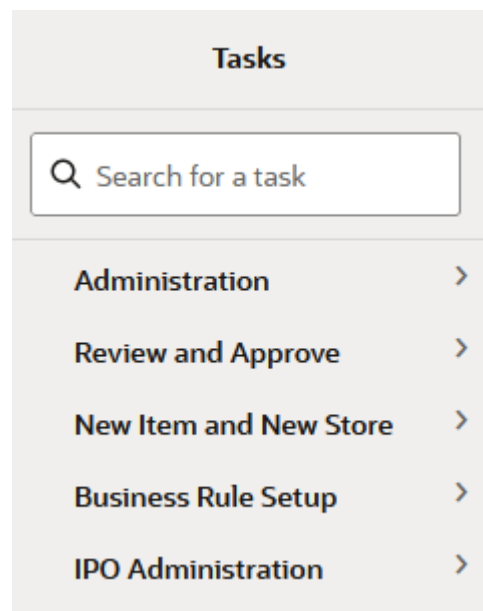
Workspace	Step	Tab	Views
			Transfer by Product View
			Transfer Deficit From-To View
			Transfer Surplus From- To View
	Filter	Filter	Attribute Filter Setup View
			Calendar Filter Setup View
			Filter Setup View
			Filter Statistics View
			Quick Filter View
			User Filter View

## Review and Approve Workspace

The Review and Approve workspace allows you to access all views listed in the Review and Approve Workspace, Steps, and Views. To build the Review and Approve workspace, perform these steps:

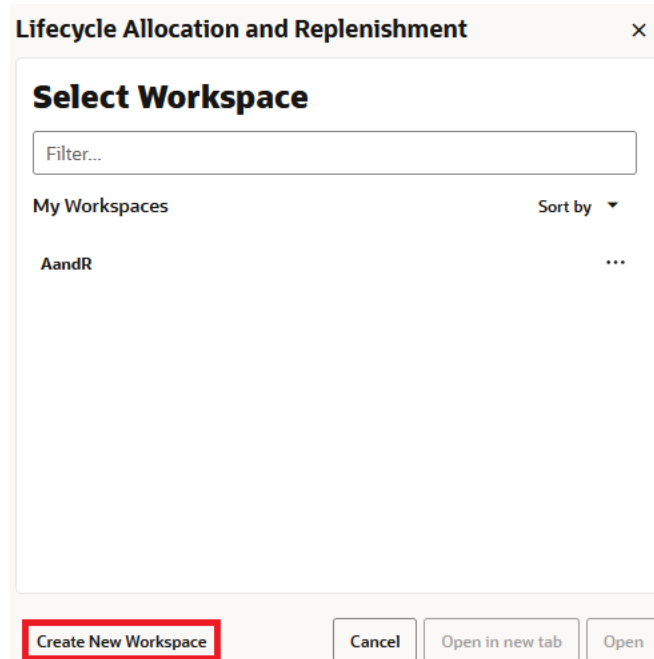
1. From the left sidebar menu, click the **Task Module** to view the available tasks.

**Figure 21-2 Task Module**



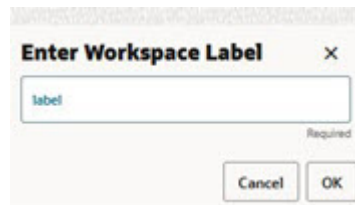
2. Click the **Review and Approve** activity to access the available workspaces.
3. Click **Lifecycle Allocation and Replenishment**. The wizard opens. You can open an existing workspace, but to create a new workspace, click **Create New Workspace**.

Figure 21-3 Lifecycle Review and Approve Wizard



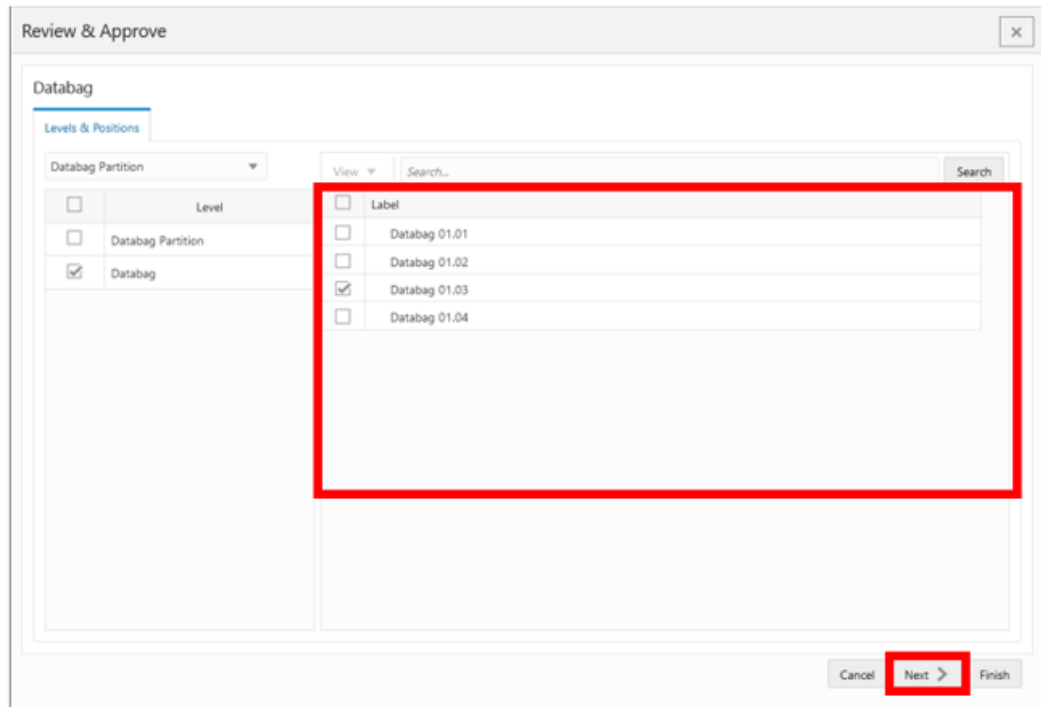
4. Enter a name for your new workspace in the label text box and click **OK**.

Figure 21-4 Enter Workspace Label



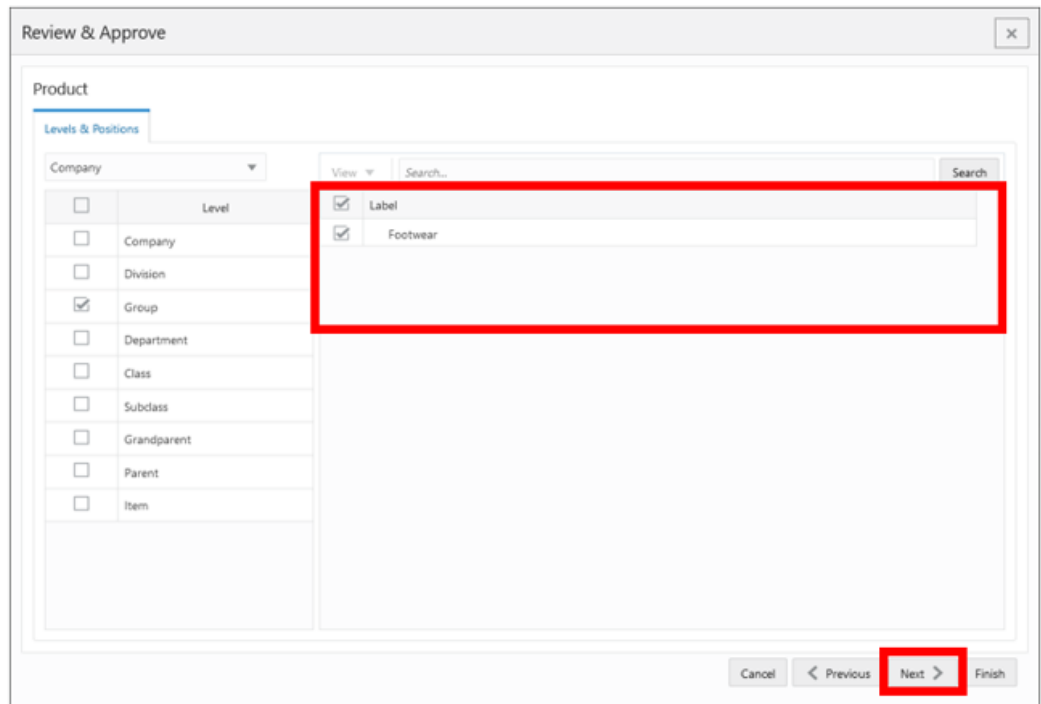
5. The workspace wizard opens. Select the databag you want to work with and click **Next**.

**Figure 21-5 Workspace Wizard: Databag**



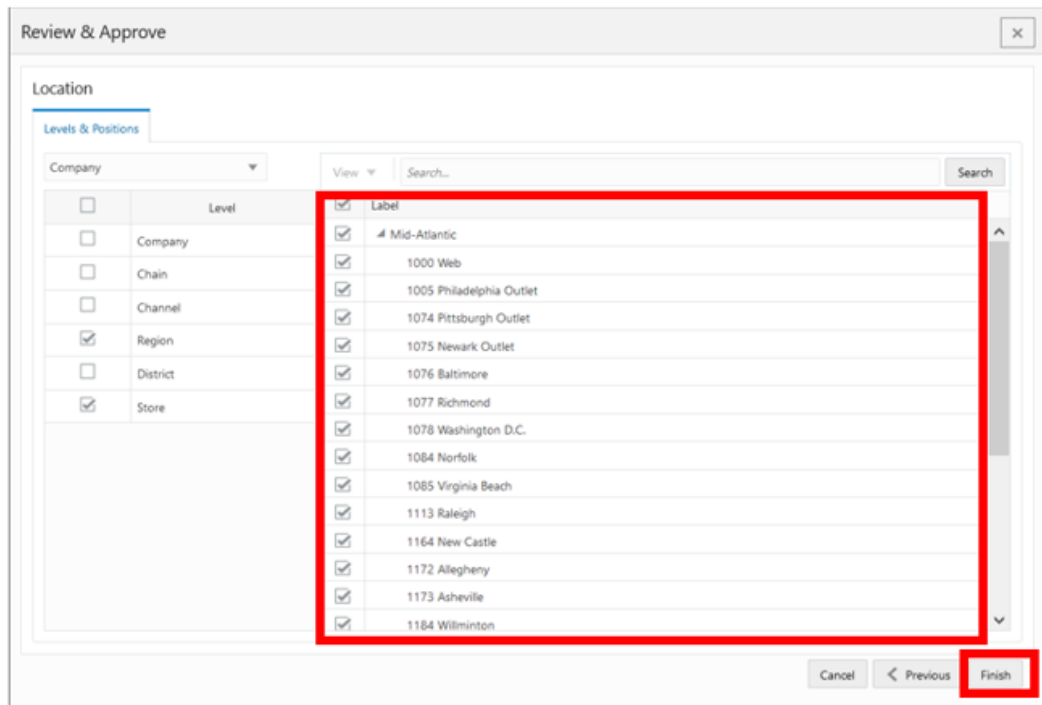
6. Select the product you want to work with and click **Next**.

**Figure 21-6 Workspace Wizard: Product**



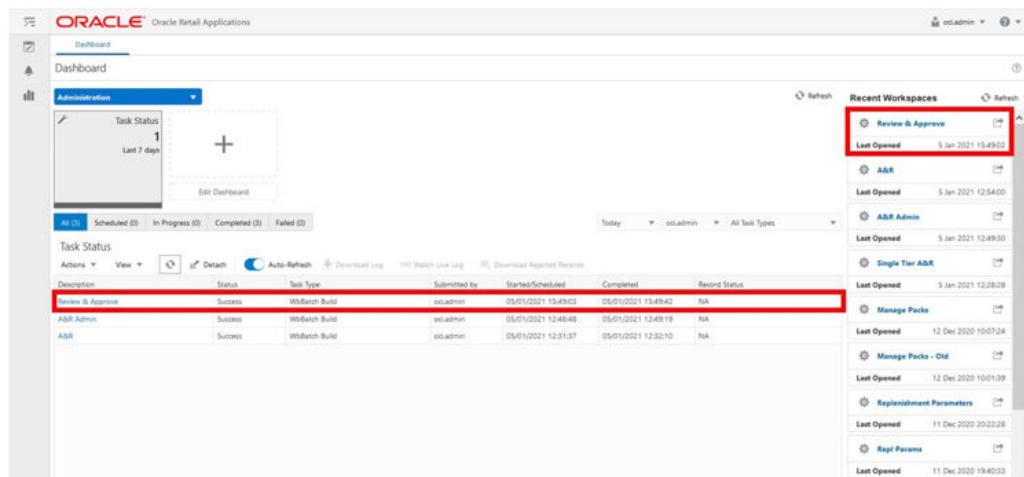
7. Select the locations you want to work with and click **Finish**.

Figure 21-7 Workspace Wizard: Locations



- The wizard notifies you that your workspace is being prepared. Successful workspaces are available from the Dashboard.

Figure 21-8 Successful Workspace Build



**Note:**

The workspace is built using the selected databag scope. The products, locations, source locations, alerts, and attributes available in the workspace are in the databag scope that is managed in the Manage Databag workspace.

## Overview Step

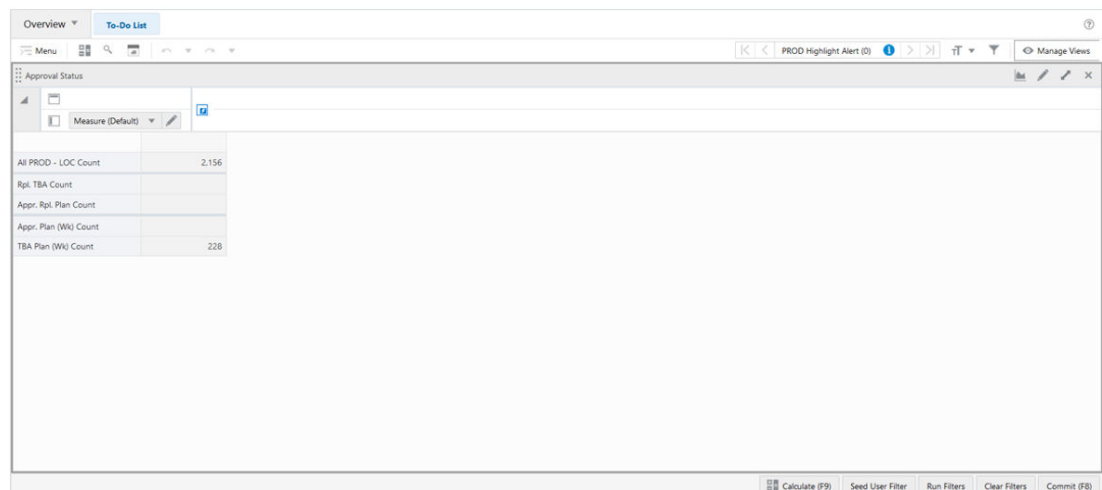
This step contains these views:

- [Approval Status View](#)
- [To-Do List View](#)
- [Today View](#)
- [User Filter View](#)

## Approval Status View

The **Approval Status View**, under the **To-Do List** tab, allows you to review approval statistics like the number of product and location combinations that were automatically approved and the ones that still require your approval.

**Figure 21-9 Approval Status View**



Measure	Count
All PROD - LOC Count	2,156
Rpl. TBA Count	
Appr. Rpl. Plan Count	
Appr. Plan (Wk) Count	
TBA Plan (Wk) Count	228

### Approval Status View - Default Profile Measures

The Approval Status view contains the following measures.

#### Rpl TBA Count

The Rpl TBA Count is a calculated measure used to indicate the total number of assorted product and location combinations that need the orders to be approved manually.

#### Appr. Rpl. Plan Count

The Approved Rpl. Plan Count is a calculated measure used to indicate the total number of assorted product and location combinations with approved orders.

#### Appr. Plan (Wk) Count

The Approved Plan (Week) Count is a calculated measure used to indicate the total number of assorted product and location combinations with approved orders for the current week.



## TBA Plan (Wk) Count

The TBA Plan (Week) Count is a calculated measure used to indicate the total number of assorted product and location combinations that need the orders to be approved manually for the current week.

## To-Do List View

The **To-Do List View**, under the **To-Do List tab**, allows you to review the number of alert hits that have been triggered as well as their types (all alerts available in IPOCS-Lifecycle Allocation and Replenishment). Within this view, you can also select the alerts to focus the review and leverage IPOCS-Lifecycle Allocation and Replenishment filter capabilities. If alerts are used as a filter, then the views under the Review & Approve steps are filtered based on the alert hits only. The alerts can be added or removed as a filter at any time by you.

**Figure 21-10 To-Do List View**

Alert	Filter By Alert	Seed User	Enable RTA	Alert Priority	Alert VAR Count	Alert To-Be-Rev VAR Count	Alert VAR-LOC Count	Alert To-Be-Rev VAR-LOC Count	Alert LOC Count	Alert To-Be-Rev LOC Count
D01 Recent Item Launch	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1 High	6	6	102	102	17	17
E01 EOL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1 High	5	5	85	85	17	17
E02 Out of Size Codes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1 High						
E03 Poor Performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1 High						
E04 Maturity to EOL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1 High						
G01 Replenishment Watch List	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1 High						
G02 Max Stockroom	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2 Medium	26	26	416	416	16	16
G03 Min Display	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2 Medium	26	26	416	416	16	16
G04 Max Display	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2 Medium						
G05 Shortage (Current)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1 High	18	18	229	229	17	17
G06 Overstock (Current)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1 High	6	6	83	83	17	17
G07 No Replenishment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1 High	11	11	155	155	16	16
G08 No Replenishment Method	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1 High						
I01 Init Alloc	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1 High	4	4	68	68	17	17
M01 Maturity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1 High	5	5	85	85	17	17
M03 Future Recommendations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1 High						

### To-Do List View - Default Profile Measures

The To-Do List view contains the following measures.

#### Filter By Alert

The Filter By Alert is an editable measure used to select what alerts should be used to filter the views under the Review & Approve Step. When alerts are selected, IPOCS-Lifecycle Allocation and Replenishment uses the calculated alert hits for the selected alerts to filter the views. The views are filtered as soon as you run the workspace calculation, (either **Calculate** or **F9**). In order to disable the alert as a filter you need to clear the alerts and re-run the workspace calculation (either **Calculate** or **F9**).

#### Seed User

The Seed User is an editable measure used to select which alerts should be used to populate the User-filtered Boolean measure. You can use this alert to first seed the User-filtered measure and then either add additional positions or reduce the positions by simply selecting or clearing the item/location combination. This is used for the filtering functionality.

#### Enable RTA

The Enable Real-Time Alerts is an editable measure used to select alerts that should be used as Real-Time Alerts (RTA) within the workspace. When alerts are selected, IPOCS-Lifecycle Allocation and Replenishment uses the calculated alert hits for the selected alerts to enable the RTA. The RTA hits and navigation capabilities are available as soon as you run the workspace calculation (either **Calculate** or **F9**). To disable the alert as RTA you need to clear the alert and re-run the workspace calculation (either **Calculate** or **F9**).

### **Alert Priority**

The Alert Priority is a calculated measure used to indicate the alert's priority.

### **Alert VAR Count**

The Alert Variant Count is a calculated measure used to indicate the total number of variants that have hits for the alert. For example, if 12 different variants were added to the replenishment watch list, regardless of the stores, then this measure indicates the number 12 in the replenishment watch list alert.

### **Alert To-Be-Rev VAR Count**

The Alert To-Be-Reviewed Variant Count is a calculated measure used to indicate the number of variants that have not been reviewed yet, out of the total number of variants that have hits for the alert.

### **Alert VAR-LOC Count**

The Alert Variant-Location Count is a calculated measure used to indicate the total number of variant and location combinations that have hits for the alert. For example, if 12 different variants are added to the replenishment watch list, for only two stores, then this measure indicates the number 24 in the replenishment watch list alert.

### **Alert To-Be-Rev VAR-LOC Count**

The Alert To-Be-Reviewed Variant-Location Count is a calculated measure used to indicate the number of variant and location combinations that have not been reviewed yet, out of the total number of variant and location combinations that have hits for the alert.

### **Alert LOC Count**

The Alert Location Count is a calculated measure used to indicate the total number of locations that have hits for the alert. For example, if 12 different variants were added to the replenishment watch list, for only two stores, then this measure indicates the number 2 in the replenishment watch list alert.

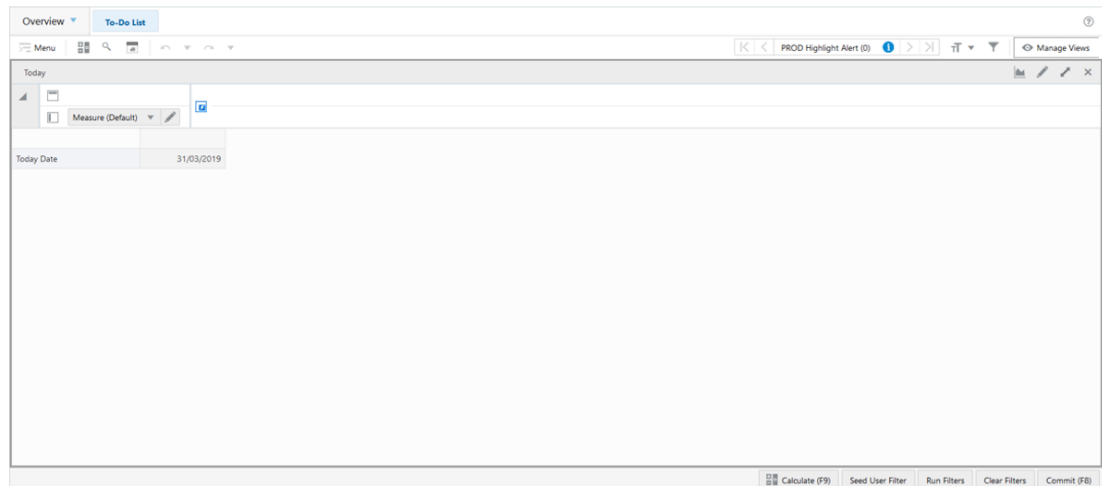
### **Alert To-Be-Rev LOC Count**

The Alert To-Be-Reviewed Location Count is a calculated measure used to indicate the number of locations that have not been reviewed yet, out of the total number of locations that have hits for the alert.

## Today View

The **Today View**, under the **Today View List tab**, allows you to check IPOCS-Lifecycle Allocation and Replenishment's Today date.

**Figure 21-11 Today View**



### Today View - Default Profile Measures

The Today view contains the following measure.

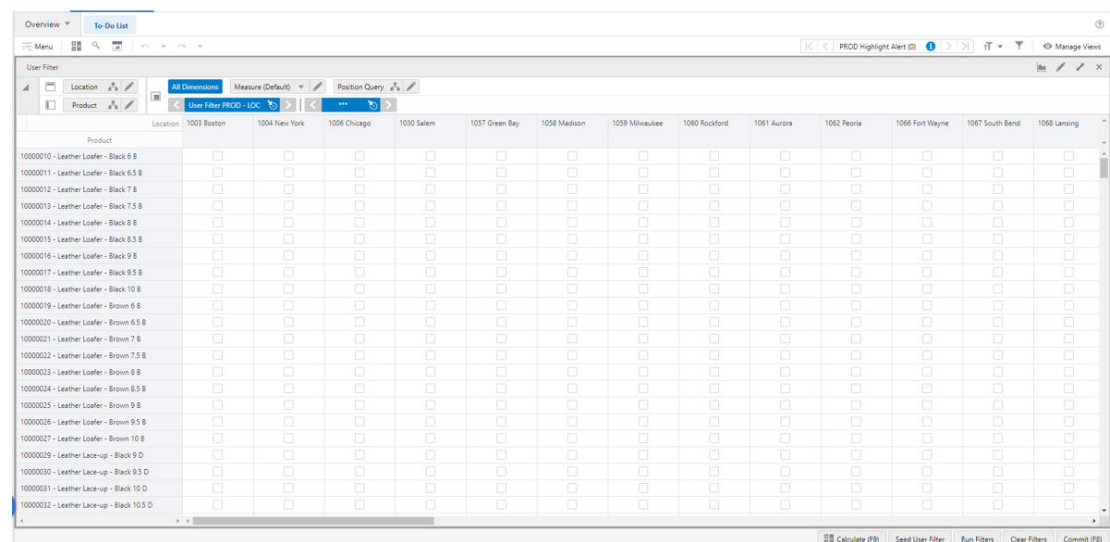
#### Today Date

The Today Date is a loaded read-only measure to display the system date that is calculated by IPOCS-Lifecycle Allocation and Replenishment batch.

## User Filter View

The **User Filter View**, under the **To-Do List** tab, allows you to configure the filter to be applied to the views within the Review & Approve workspace. In this view you can configure the filter to be applied to the product and location hierarchies. Once a change is performed it is applied after running the workspace calculation (either **Calculate** or **F9**).

**Figure 21-12 User Filter View**



### User Filter View - Default Profile Measures

The User Filter view contains the following measure.

#### User Filter PROD-LOC

User Filter Product and Location is an editable measure to restrict the filter by the product and location combinations when the measure User Filter PROD-LOC is selected.

## Review & Approve Step

In this step you can review at different levels, the orders calculated by IPOCS-Lifecycle Allocation and Replenishment and approve them. This step contains these views:

#### By Prod Tab

- [SKU Level \(R & A\) View](#)
- [SKU-LOC Level \(R & A\) View](#)
- [SKU-Source LOC Level \(R & A\) View](#)
- [VAR-LOC Level \(R & A\) View](#)
- [VAR-Source LOC Level \(R & A\) View](#)

#### By Location Tab

- [LOC Level \(R & A\) View](#)
- [LOC-SKU Level \(R & A\) View](#)
- [LOC-VAR Level \(R & A\) View](#)
- [Source LOC-SKU Level \(R & A\) View](#)
- [Source LOC-VAR Level \(R & A\) View](#)

#### Space Tab

- [Display Space by LOC \(R & A\) View](#)
- [Display Space by SKU \(R & A\) View](#)
- [Stockroom Space by LOC \(R & A\) View](#)
- [Stockroom Space by SKU \(R & A\) View](#)

#### OTB Tab

- [OTB \(R & A\) View](#)

## SKU Level (R & A) View

The **SKU Level (R & A) View**, under the **By Prod tab**, allows you to review the replenishment and allocation calculated values at the product level only (no location). Additionally, the sales and forecast for the previous and forthcoming four weeks are also available.

The navigation of this view is driven by real-time alerts or workspace alerts. To leverage the real-time alert navigation in this workspace the desired alerts should be enabled as RTA (measure Enable RTA) in the To-Do List view.

Figure 21-13 SKU Level (R & A) View

SKU	User Filter PROD - LOC	Revwd PROD - LOC	PROD Alerts	Actual Sales W-4 Units	Actual Sales W-3 Units	Actual Sales W-2 Units	Actual Sales W-1 Units	Actual Sales W-4 to W-1 Units	W+0 Units	Fast W+1 Units
2000001 - KTS Low "Home"	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk, MinDisp	98	98	98	98	98	71	65
2000002 - KTS Low "Home"	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk, MinDisp	98	98	98	98	98	69	63
2000003 - KTS Low "Home"	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk, MinDisp	98	98	98	98	98	70	63
2000004 - "Independence Day"	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk, MinDisp	98	98	98	98	98	70	61
2000005 - "Independence Day"	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk, MinDisp	98	98	98	98	98	68	65
2000006 - "Independence Day"	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk, MinDisp	98	98	98	98	98	71	64
2000007 - "Have Fun in LA"	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk, MinDisp	98	98	98	98	98	69	65
2000008 - "Have Fun in LA"	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk, MinDisp	98	98	98	98	98	70	64
2000009 - "Have Fun in LA"	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk, MinDisp	98	98	98	98	98	69	64
2000010 - 2020 Summer	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk, MinDisp	98	98	98	98	98	69	65
2000011 - 2020 Summer	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk, MinDisp	98	98	98	98	98	67	64
2000012 - 2020 Summer	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk, MinDisp	98	98	98	98	98	71	64
2000013 - "Have Fun" 2020	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk, MinDisp	98	98	98	98	98	69	65
2000014 - "Have Fun" 2020	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk, MinDisp	98	98	98	98	98	70	64
10000010 - Women's Canvas	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk, MinDisp							

**Note:**

The measures being displayed in this view, regardless of the measure profile, are supported by their counterparts defined at the product and location level. Therefore, the calculated measures in this view are the result of aggregating the ones at the product and location intersection.

**SKU Level (R & A) View - Default Profile Measures**

The Default measure profile available in the SKU Level (R & A) view contains the following measures.

**User Filter PROD - LOC**

The User Filter PROD - LOC is an editable measure used to include specific product and location combinations into the quick filter. When selected, by clicking the **Run Filters** action menu, the quick filter restricts the condition to search only for the product and location combinations selected. When clear, the product and location combinations are not included in the filter condition.

**Revwd PROD - LOC**

The Revwd PROD - LOC is an editable measure used to indicate that the product and location combination alerts have been reviewed.

**PROD Alerts**

The PROD Alerts is a calculated measure used to display the Alert Short Descr. of all alerts that were triggered for the product.

**Actual Sales W-4 Units**

The Actual Sales W-4 Units is a calculated measure used to display the accumulated daily sales units at the system date week - 4 weeks. The system date is available in the Today view.

**Actual Sales W-3 Units**

The Actual Sales W-3 Units is a calculated measure used to display the accumulated daily sales units at the system date week - 3 weeks. The system date is available in the Today view.

**Actual Sales W-2 Units**

The Actual Sales W-2 Units is a calculated measure used to display the accumulated daily sales units at the system date week - 2 weeks. The system date is available in the Today view.

**Actual Sales W-1 Units**

The Actual Sales W-1 Units is a calculated measure used to display the accumulated daily sales units at the system date week - 1 week. The system date is available in the Today view.

**Actual Lost Sales W-4 to W-1 Units**

The Actual Lost Sales W-4 to W-1 Units is a calculated measure used to display the accumulated lost sales units from the system date week – 4 until the previous week (from the system date week). The system date is available in the Today view.

**Actual Sales W+0 Units**

The Actual Sales W+0 Units is a calculated measure used to display the accumulated daily sales units for the current system date week. The system date is available in the Today view.

**Fcst W+0 Units**

The Fcst W+0 Units is a calculated measure used to display forecast units for the current system date week. The system date is available in the Today view.

**Fcst W+1 Units**

The Fcst W+1 Units is a calculated measure used to display forecast units at the system date week +1 week. The system date is available in the Today view.

**Fcst W+2 Units**

The Fcst W+2 Units is a calculated measure used to display forecast units at the system date week +2 weeks. The system date is available in the Today view.

**Fcst W+3 Units**

The Fcst W+3 Units is a calculated measure used to display forecast units at the system date week + 3 weeks. The system date is available in the Today view.

**Lifecycle Sales To-Date %**

The Lifecycle Sales To-Date % is a calculated measure used to indicate the percentage of actual sales up to date against the total initial forecast.

**Figure 21-14 Calculation**

$$100 * \frac{\sum_{\text{firstweek}}^{\text{currentweek}} \text{ActualLoc. SalesUnits}}{\text{Tot. Init. FcstUnits}}$$

**Lifecycle Sales To-Go %**

The Lifecycle Sales To-Go % is a calculated measure used to indicate the percentage of sales to complete the total initial forecast.

**Figure 21-15 Calculation**

$$100 * \frac{\sum_{\text{currentweek}}^{\text{horizon}} \text{ActualLoc. SalesUnits} + \text{SellOutFcst}(Wk)\text{Units}}{\text{Tot. Init. FcstUnits}}$$

**Asst. Prod-Loc Start Date**

The Asst. Prod-Loc Start Date is a loaded measure used to indicate the assortment start date for the assorted product and location combinations.

**Asst. Prod-Loc End Date**

The Asst. Prod-Loc End Date is a loaded measure used to indicate the assortment end date for the assorted product and location combinations.

**Asst. Prod-Loc Active Count**

The Asst. Prod-Loc Active Count is a calculated measure used to indicate the total number of product and location combinations assorted and still active. If the assortment end date has not been reached yet then, it is active. Otherwise, it is inactive; meaning that the assortment has stopped already.

**RUTL @Today Units**

The RUTL @Today Units is a calculated measure used to indicate the Reorder Up-to Level (RUTL) value in units for the product and location combination at the system date. In this view, the value is the total of all locations for the product.

**Tot. Dest. Avail. Units**

The Tot. Dest. Avail. Units is a calculated measure used to indicate the total quantity of units available at the destination location. In this view, the value is the total of all locations where there is available inventory for the product.

**Unc Need Total Units**

The Unc Need Total Units is a calculated measure used to indicate the total unconstrained quantity, in units, needed for the location. In this view, the value is the total of all locations for the product.

**Sys. Rpl. Plan In Units**

The Sys. Rpl. Plan In Units is a calculated measure used to indicate the order quantity for the location based on the location's needs. This value is calculated based on the replenishment rules and the location forecast. In this view, the value is the total of all locations for the product.

**Sys. Rpl. Plan In Pack Units**

The Sys. Rpl. Plan In Pack Units is a calculated measure used to indicate the order quantity, in pack order quantity, for the location based on the location needs. This value is calculated based on the replenishment rules and the location forecast. In this view, the value is the total of all locations for the product.

**Rpl. TBA Count**

The Rpl. TBA Count is a calculated measure used to indicate the total number of assorted product and location combinations that need the orders to be approved manually. In this view, the value is the total of all locations for the product.

**Tot. Deficit Units**

The Tot. Deficit Units is a calculated measure used to indicate the product inventory deficit using the total available inventory and Reorder Up-to Level (RUTL) value.

**Figure 21-16 Calculation**

$$\text{Max}\left(\sum_{\text{allocations}} (\text{RUTL@TodayUnits} - \text{Tot. Avail. Units}), 0\right)$$

**Tot. Surplus Units**

The Tot. Surplus Units is a calculated measure used to indicate the product inventory surplus using the total available inventory and Reorder Up-to Level (RUTL) value.

**Figure 21-17 Calculation**

$$\text{Max}\left(\sum_{\text{allocations}} (\text{Tot. Avail. Units} - \text{RUTL@TodayUnits}), 0\right)$$

**SKU Level (R & A) View - Actuals Profile Measures**

The Actuals measure profile available in the SKU Level (R & A) view contains the following measures.

**User Filter PROD - LOC**

The User Filter PROD - LOC is the same as the one in the default profile. Refer to the measure User Filter PROD-LOC in the Default Profile Measures.

**Actual PL Sales Wk Units**

The Actual PL Sales Wk Units is a calculated measure used to indicate the weekly sales, aggregated from the daily sales, for the product and location combination. In this view, the value is the total of all locations and all weeks for the product.

**Actual Loc. Sales Units**

The Actual Loc. Sales Units is a calculated measure used to indicate the weekly sales, aggregated from the daily sales, for the product and location combinations. In this view, the value is the total of all locations and all weeks for the product.

**Actual Loc.Recpt Units**

The Actual Loc.Recpt Units is a calculated measure used to indicate the weekly receipts for the product and location combination. In this view, the value is the total of all locations and all weeks for the product.

**Actual Loc. Shipmt Units**

The Actual Loc. Shipmt Units is a calculated measure used to indicate the weekly shipments for the product and location combinations. In this view, the value is the total of all locations and all weeks for the product.



**Actual Sales W-4 Units**

The Actual Sales W-4 Units is the same as the one in the default profile. Refer to the measure, Actual Sales W-4 Units, in the Default Profile Measures.

**Actual Sales W-3 Units**

The Actual Sales W-3 Units is the same as the one in the default profile. Refer to the measure, Actual Sales W-3 Units in the Default Profile Measures.

**Actual Sales W-2 Units**

The Actual Sales W-2 Units is the same as the one in the default profile. Refer to the measure, Actual Sales W-2 Units, in the Default Profile Measures.

**Actual Sales W-1 Units**

The Actual Sales W-1 Units is the same as the one in the default profile. Refer to the measure, Actual Sales W-1 Units, in the Default Profile Measures.

**Actual Sales W+0 Units**

Actual Sales W+0 Units is the same as the one in the default profile. Refer to the measure, Actual Sales W+0 Units, in the Default Profile Measures.

**Actual Sales W-1 + W+0 Units**

The Actual Sales W-1 + W+0 Units is a calculated measure used to display the accumulated sales units from the system date week – 1 until the system current week. The system date is available in the Today view.

**Actual Sales W-2 + W+0 Units**

The Actual Sales W-2 + W+0 Units is a calculated measure used to display the accumulated sales units from the system date week – 2 until the system current week. The system date is available in the Today view.

**Actual Sales W-3 + W+0 Units**

The Actual Sales W-3 + W+0 Units is a calculated measure used to display the accumulated sales units from the system date week – 3 until the system current week. The system date is available in the Today view.

**Actual Sales W-4 + W+0 Units**

The Actual Sales W-4 + W+0 Units is a calculated measure used to display the accumulated sales units from the system date week – 4 until the system current week. The system date is available in the Today view.

**Actual Lost Sales W-4 to W-1 Units**

Actual Lost Sales W-4 to W-1 Units is the same as the one in the default profile. Refer to the measure, Actual Lost Sales W-4 to W-1 Units, in the Default Profile Measures.

**Actual Sales D-7 Units**

The Actual Sales D-7 Units is a calculated measure used to display the accumulated daily sales units for the last 7 days (from the system date - 7 days until system date). The system date is available in the Today view.

**Actual Sales D-15 Units**

The Actual Sales D-15 Units is a calculated measure used to display the accumulated daily sales units for the last 15 days (from the system date - 15 days until system date). The system date is available in the Today view.

**Actual Sales D-30 Units**

The Actual Sales D-30 Units is a calculated measure used to display the accumulated daily sales units for the last 30 days (from the system date - 30 days until system date). The system date is available in the Today view.

**Actual Avg Inv. W-1 Units**

The Actual Avg Inv. W-1 Units is a calculated measure used to display the average inventory units at the previous week (system date week - 1 week). The system date is available in the Today view.

**Actual Avg Inv. W-2 Units**

The Actual Avg Inv. W-2 Units is a calculated measure used to display the average inventory units at the system date week - 2 weeks. The system date is available in the Today view.

**Actual Avg Inv. W-3 Units**

The Actual Avg Inv. W-3 Units is a calculated measure used to display the average inventory units at the system date week - 3 weeks. The system date is available in the Today view.

**Actual Avg Inv. W-4 Units**

The Actual Avg Inv. W-4 Units is a calculated measure used to display the average inventory units at the system date week - 4 weeks. The system date is available in the Today view.

**Actual PL Avg Inv. Wk Units**

The Actual PL Avg Inv. Wk Units is a calculated measure to display the average holding inventory of the assortment period.

**SKU Level (R & A) View - Availability Profile Measures**

The Availability measure profile available in the SKU Level (R & A) view contains the following measures.

**User Filter PROD - LOC**

The User Filter PROD - LOC is the same as the one in the default profile. Refer to the measure User Filter PROD-LOC in the Default Profile Measures.

**RUTL Mask**

The RUTL Mask is a calculated measure used to indicate whether the product and location combination is eligible for replenishment. When selected, then it is eligible. When clear, it is not eligible. In this view, if at least one location is eligible then the product is eligible.

**Rpl. Dest. Mask**

The Rpl. Dest. Mask is a calculated measure used to indicate whether the product and location combination is eligible for replenishment and the constraint parameter at the system date indicates that replenishment is enabled (measure Rpl. Active (Dst) @ Today). When selected, then it is eligible. When clear, it is not eligible. In this view, if at least one location is eligible then the product is eligible.

**Rpl. Src. Mask**

The Rpl. Src. Mask is a calculated measure used to indicate whether the product and source location combination is eligible for replenishment. When selected, then it is eligible. When clear, it is not eligible. In this view, if at least one location is eligible then the product is eligible.

**Tot. On Hand Units**

The Tot. On Hand Units is a calculated measure used to indicate the total on-hand inventory units. The total on-hand units include the on-hand inventory loaded into IPOCS-Lifecycle Allocation and Replenishment plus the on-hand inventory units for the replacement or phase-out product, if any.

**In Transit over LT+RT Units**

The In Transit over LT+RT Units is a calculated measure used to indicate the total in transit units over the lead time plus the review time.

**On Order (in) over LT+RT Units**

The On Order (in) over LT+RT Units is a calculated measure used to indicate the total on orders (in) units over the lead time plus the review time.

**Exp. Rpl. Plan In Units**

The Exp. Rpl. Plan In Units is a calculated measure used to indicate the replenishment planned units to be exported from the batch for the product and location combination. In this view, the value is the total of all destination locations for the product.

**Appr. Rpl. Plan In Units**

The Appr. Rpl. Plan In Units is a calculated measure used to indicate the approved replenishment planned units for the product and location combination. In this view, the value is the total of all destination locations for the product.

**Appr. Rpl. Plan In Pack Units**

The Appr. Rpl. Plan In Pack Units is a calculated measure used to indicate the approved replenishment planned packs units for the product and location combination. In this view, the value is the total of all destination locations for the product.

**Sys. Rpl. Plan In Units**

The Sys. Rpl. Plan In Units is the same as the one in the default profile. Refer to the measure, Sys. Rpl. Plan In Units, in the Default Profile Measures.

**Transfer Plan In Units**

The Transfer Plan In Units is a calculated measure used to indicate the transfer units planned for the product and location combination. In this view, the value is the total of all destination locations for the product.

**Appr. Transfer In Units**

The Appr. Transfer In Units is a calculated measure used to indicate the transfer units approved for the product and location combination. In this view, the value is the total of all destination locations for the product.

**Exp. Transfer Plan In Units**

The Exp. Transfer Plan In Units is a calculated measure used to indicate the transfer units to be exported from the batch for the product and location combination. In this view, the value is the total of all destination locations for the product.

**On Order (out) over LT+RT Units**

The On Order (out) over LT+RT Units is a calculated measure used to indicate the total on orders (out) units over the lead time plus the review time.

**Exp. Rpl. Plan Out Units**

The Exp. Rpl. Plan Out Units is a calculated measure used to indicate the source location (for example, warehouse) replenishment planned units to be exported from the batch for the product and location combination. In this view, the value is the total of all source locations for the product.

**Appr. Rpl. Plan Out Units**

Appr. Rpl. Plan Out Units is a calculated measure used to indicate the source location approved replenishment units for the product and location combination. In this view, the value is the total of all source locations for the product.

**Sys. Rpl. Plan Out Units**

The Sys. Rpl. Plan Out Units is a calculated measure used to indicate the order quantity for the source location based on the source location needs. This value is calculated based on the replenishment rules and the source location demand. In this view, the value is the total of all source locations for the product.

**Transfer Plan Out Units**

The Transfer Plan Out Units is a calculated measure used to indicate the source location's transfer units planned for the product and location combination. In this view, the value is the total of all locations for the product.

**Appr. Transfer Out Units**

The Appr. Transfer Out Units is a calculated measure used to indicate the source location's transfer units approved for the product and location combination. In this view, the value is the total of all locations for the product.

**Exp. Transfer Plan Out Units**

The Exp. Transfer Plan Out Units is a calculated measure used to indicate the source location's transfer units to be exported from the batch for the product and location combination. In this view, the value is the total of all locations for the product.

**Tot. Dest. Avail. Units**

The Tot. Dest. Avail. Units is the same as the one in the default profile. Refer to the measure, Tot. Dest. Avail. Units, in the Default Profile Measures.

**Tot. Dest. Avail Dur (w)**

The Tot. Dest. Avail Dur (w) is a calculated measure used to indicate the number of weeks that the Tot. Dest. Avail. Units can cover the demand for the product and location combination.

**Tot. Physical Avail. Units**

The Tot. Physical Avail. Units is a calculated measure used to indicate the total quantity of units' physically available at the destination location. The physically available units differ from the available units as the booked inventory is taken into consideration. In this view, the value is the total of all locations for the product.

**Figure 21-18 Calculation**

$$\text{Tot. Dest. Avail. Units} - \text{Tot. BookedUnits}$$

**Tot. Physical Avail. Dur (w)**

The Tot. Physical Avail. Dur (w) is a calculated measure used to indicate the number of weeks that the Tot. Physical Avail. Units can cover the demand for the product and location combination.

**Up To Dest. Avail Units**

The Up To Dest. Avail Units is the same as Tot. Dest. Avail Units grouped by source.

**Up To Dest. Avail Dur (w)**

The Up To Dest. Avail Dur (w) is the same as Tot. Dest. Avail Units grouped by source displayed by duration (weeks).

**Tot. Src. Avail. Units**

The Tot. Src. Avail. Units is a calculated measure used to indicate the total quantity of units available at the source location.

**Tot. Src. Avail. Pack Units**

The Tot. Src. Avail. Pack Units is a calculated measure used to indicate the total quantity of pack units available at the source location.

**Tot. Dest. Avail. (incl. Rpl. & Trsf. Out)**

The Tot. Dest. Avail. (incl. Rpl. & Trsf. Out) is the Total Destination Available stock, which is calculated as the sum of all inbound deliveries following replenishment, plus stock on hand but excluding all planned and approved outbound shipments – this measure provides the location net inventory following replenishment calculation.

**Tot. Avail. Units**

The Tot. Avail. Units is a calculated measure used to indicate the total quantity of units available for the product considering all inventory (booked, on-hand, transit, and on-order) plus all orders (approved, planned, and exported) plus all transfers (approved, planned, and exported).

**Tot. Avail. Dur (w)**

The Tot. Avail. Dur (w) is a calculated measure used to indicate the number of weeks that the Tot. Avail. Units can cover the demand for the product and location combination.

**SKU Level (R & A) View - Forecast Profile Measures**

The Forecast measure profile available in the SKU Level (R & A) view contains the following measures.

**User Filter PROD - LOC**

The User Filter PROD - LOC is the same as the one in the default profile. Refer to the measure User Filter PROD-LOC in the Default Profile Measures.

**Fcst W+0 Units**

The Fcst W+0 Units is the same as the one in the default profile. Refer to the measure, Fcst W+0 Units, in the Default Profile Measures.

**Fcst W+1 Units**

The Fcst W+1 Units is the same as the one in the default profile. Refer to the measure, Fcst W+1 Units, in the Default Profile Measures.

**Fcst W+2 Units**

The Fcst W+2 Units is the same as the one in the default profile. Refer to the measure, Fcst W+2 Units, in the Default Profile Measures.

**Fcst W+3 Units**

The Fcst W+3 Units is the same as the one in the default profile. Refer to the measure, Fcst W+3 Units, in the Default Profile Measures.

**Fcst W+0 to W+1 Units**

The Fcst W+0 to W+1 Units is a calculated measure used to display the accumulated forecast from the current system date week until the system current week + 1. The system date is available in the Today view.

**Fcst W+0 to W+2 Units**

The Fcst W+0 to W+2 Units is a calculated measure used to display the accumulated forecast from the current system date week until the system current week + 2. The system date is available in the Today view.

**Fcst W+0 to W+3 Units**

The Fcst W+0 to W+3 Units is a calculated measure used to display the accumulated forecast from the current system date week until the system current week + 3. The system date is available in the Today view.

**Forecast Overt LT+RT Units**

The Forecast Overt LT+RT Units is a calculated measure used to display the daily Forecast Demand, in units, from the system date up to number of days of Lead Time plus Review Time. The system date is available in the Today view.

**Final Fcst PL Wk Units**

The Final Fcst PL Wk Units is a calculated measure used to display the final weekly forecast after being spread from the variant level.

**Sell-Out Fcst (Wk) Units**

The Sell-Out Fcst (Wk) Units is an editable measure used to enter product demand at the destination locations. In this view, the measure is aggregated and when changed, the value is spread proportionally across the locations and weeks within the workspace (you can check the spread value in the SKU-LOC-WEEK Level (InvPlan) view).

**Sell-In Fcst (Wk) Units**

The Sell-In Fcst (Wk) Units is an editable measure used to enter the weekly demand at the source location for the product and location combination.

**Tot. Demand (Wk) Units**

The Tot. Demand (Wk) Units is a calculated measure used to indicate the total weekly demand for the product. In this view, the measure is aggregated (you can check the weekly value in the SKU-LOC-WEEK Level (InvPlan) view).

#### **Up To Sell-Out Fcst Units**

The Up To Sell-Out Fcst Units is a calculated measure used to indicate the sell-out Forecast from the source location perspective for the products.

#### **SKU Level (R & A) View - Inventory Profile Measures**

The Inventory measure profile available in the SKU Level (R & A) view contains the following measures.

#### **User Filter PROD - LOC**

The User Filter PROD - LOC is the same as the one in the default profile. Refer to the measure User Filter PROD-LOC in the Default Profile Measures.

#### **Tot. On Hand Units**

The Tot. On Hand Units is the same as the one in the availability profile. Refer to the measure, Tot. On Hand Units, in the in the Availability Profile Measures.

#### **Tot. Booked Units**

The Tot. Booked Units is a calculated measure used to indicate the total inventory booked in units.

#### **In Transit over LT+RT Units**

The In Transit over LT+RT Units is the same as the one in the availability profile. Refer to the measure, In Transit over LT+RT Units, in the Availability Profile Measures.

#### **Tot. In Transit Units**

The Tot. In Transit Units is a calculated measure used to indicate the total inventory units in transit.

#### **Tot. In Transit**

The Tot. In Transit is a calculated measure used to display your comment for the in-transit inventory and your comment for the phase-out item's inventory, if any.

#### **Tot. On Order (in) Units**

The Tot. On Order (in) Units is a calculated measure used to indicate the total on-order inventory units. The total on-order units include the on-order inventory loaded into IPOCS-Lifecycle Allocation and Replenishment plus the on-order inventory units for the replacement/phase-out product, if any.

#### **On Order (in) over LT+RT Units**

The On Order (in) over LT+RT Units is the same as the one in the availability profile. Refer to the measure, On Order (in) over LT+RT Units, in the Availability Profile Measures.

#### **In Transit + On Order (in) Units**

The In Transit + On Order (in) Units is a calculated measure used to indicate the accumulated on-order and in-transit inventory units at the locations for the product.

#### **Tot. on Order (out) Units**

The Tot. on Order (out) Units is a calculated measure used to indicate the total on-order inventory units out from the source locations (for example, warehouse). The total on-order (out) units include the on-order inventory loaded into IPOCS-Lifecycle Allocation and Replenishment plus the on-order (out) inventory units for the replacement/phase-out product, if any.

**On Order (out) over LT+RT Units**

The On Order (out) over LT+RT Units is the same as the one in the availability profile. Refer to the measure, On Order (out) over LT+RT Units, in the Measures: Availability Profile in the Default Profile Measures.

**Tot. Cust. Order Units**

The Tot. Cust. Order Units is a calculated measure used to indicate the total customer orders units. The total customer orders include the customer orders loaded into IPOCS-Lifecycle Allocation and Replenishment plus the customer orders for the replacement/phase-out product, if any.

**Loc. On Hand Units**

The Loc. On Hand Units is a loaded measure used to indicate the on-hand inventory units for the product and location combinations. In this view, the displayed value is for the product considering all locations.

**Loc. Booked Units**

The Loc. Booked Units is a loaded measure used to indicate the booked or reserved inventory units for the product and location combinations. In this view, the displayed value is for the product considering all locations.

**Loc. In Transit Units**

The Loc. In Transit Units is a loaded measure used to indicate the in-transit inventory units for the product and location combinations. In this view, the displayed value is for the product considering all locations.

**Loc In Transit**

vLoc In Transit is a loaded measure used to indicate whether the product and location combination has in-transit inventory or not. When selected, there is in-transit inventory. When clear, there is no in-transit inventory. In this view, a product has in-transit inventory if there is at least one location with in-transit inventory.

**Loc. On Order (in) Units**

The Loc. On Order (in) Units is a loaded measure used to indicate the in-transit inventory units for the product and location combinations. In this view, the displayed value is for the product considering all locations.

**Loc. On Order (out) Units**

The Loc. On Order (out) Units is a loaded measure used to indicate the on-order inventory units (into the destination locations) for the product and location combinations. In this view, the displayed value is for the product considering all locations.

**Cust. Order Units**

The Cust. Order Units is a loaded measure used to indicate the on-order inventory units (out from source locations) for the product and location combinations. In this view, the displayed value is for the product considering all locations.

**Ph. Out On Hand Units**



The Ph. Out On Hand Units is a calculated measure used to indicate the on-hand inventory units for the phased-out item, if any.

**Ph. Out Booked Units**

The Ph. Out Booked Units is a calculated measure used to indicate the booked or reserved inventory units for the phased-out item, if any.

**Ph. Out In Transit Units**

The Ph. Out In Transit Units is a calculated measure used to indicate the in-transit inventory units for the phased-out item, if any.

**Ph. Out In Transit**

The Ph. Out In Transit is a calculated measure used to indicate whether the phased-out item has in-transit inventory or not. When selected, there is in-transit inventory. When clear, there is no in-transit inventory.

**Ph. Out On Order (in) Units**

The Ph. Out On Order (in) Units is a calculated measure used to indicate the on-order inventory units (into the destination locations) for the phased-out item, if any.

**Ph. Out On Order (out) Units**

The Ph. Out On Order (out) Units is a calculated measure used to indicate the on-order inventory units (out from source locations) for the phased-out item, if any.

**Ph. Out Cust. Order Units**

The Ph. Out Cust. Order Units is a calculated measure used to indicate the customer orders for the phased-out item, if any.

**Pack Type**

The Pack Type is a loaded measure used to indicate the product's pack type. Either simple or complex.

**Pack Desc.**

The Pack Desc. is a loaded measure used to indicate the product's pack description.

**Pack - SKU Ass. Count**

The Pack - SKU Ass. Count is a calculated measure used to indicate the total number of products (SKU) in the pack.

**Pack - SKU Ass. Units**

The Pack - SKU Ass. Units is an editable measure used to indicate the total number of units that the product (SKU) has in the pack.

**SKU Level (R & A) View - Parameters Profile Measures**

The Parameters measure profile available in the SKU Level (R & A) view contains the following measures.

**User Filter PROD - LOC**

The User Filter PROD - LOC is the same as the one in the default profile. Refer to the measure User Filter PROD-LOC in the Default Profile Measures.

**Asst. Prod-Loc**

The Asst. Prod-Loc is a loaded measure used to indicate whether the product and location combinations are assorted or not. For more details, refer to the same measure in the Product-Location view within the Manage Assortment workspace.

**Asst. Prod-Loc Count**

The Asst. Prod-Loc Count is a loaded measure used to indicate the total number of product and location combinations assorted. For more details, refer to the same measure in the Product-Location view within the Manage Assortment workspace.

**Asst. Prod-Loc Active**

The Asst. Prod-Loc Active is a loaded measure used to indicate whether the product and location combinations are assorted and still active or not. For more details check the same measure in the view Product- Location within the Manage Assortment workspace.

**Asst. Prod-Loc Active Count**

The Asst. Prod-Loc Active Count is a loaded measure used to indicate the total number of product and location combinations assorted and still active. For more details, refer to the same measure in the Product-Location view within the Manage Assortment workspace.

**Asst. Prod-Loc Start Date**

The Asst. Prod-Loc Start Date is a loaded measure used to indicate the assortment start date for the assorted product and location combinations. For more details, refer to the same measure in the Product-Location view within the Manage Assortment workspace.

**Asst. Prod-Loc End Date**

The Asst. Prod-Loc End Date is a loaded measure used to indicate the assortment end date for the assorted product and location combinations. For more details, refer to the same measure in the Product-Location view within the Manage Assortment workspace.

**Lfc. Prod-Loc**

The Lfc. Prod-Loc is a loaded measure used to indicate whether the product and location combination has a valid lifecycle or not. For more details, refer to the same measure in the Product-Location view within the Manage Assortment workspace.

**Lfc. Prod-Loc Count**

The Lfc. Prod-Loc Count is a calculated measure used to indicate the number of locations where the product has a valid lifecycle.

**Lfc. Active @ Today**

The Lfc. Active @ Today is a loaded measure used to indicate whether the product and location combination has a valid lifecycle or not at the system date. In this view, the product has an active lifecycle if there is at least one location with an active lifecycle.

**Lfc. Active @ Today**

The Lfc. Active @ Today is a loaded measure used to indicate the lifecycle phase string for the product and location combination when the product and location combination has a valid lifecycle at the system date. In this view, the values are aggregated to the product level only using the ambig aggregation.

**Display Qty Units**

The Display Quantity Units is a loaded measure used to indicate the Display Quantity for the product and location combination used by IPOCS-Lifecycle Allocation and Replenishment for the RUTL calculation. In this view, the value is the total for the product.

### **Min Order Qty Units**

The Min Order Quantity Units is an editable measure used to indicate the minimum order quantity for the product and location combination. In this view, the value is the total for the product.

### **Mult. Order Qty Units**

The Mult. Order Quantity Units is an editable measure used to indicate the number of multiple order quantities for the product and location combination. In this view, the value is the total for the product.

### **Fixed TS 1 Units**

The Fixed TS 1 Units is a loaded measure used to indicate the initial allocation for the product and location combination. For more details, refer to the same measure in the Product-Location view within the Manage Assortment workspace.

### **Fixed TS 2 Units**

The Fixed TS 2 Units is an editable measure used to indicate an initial allocation for the product and location combination. For more details, refer to the same measure in the Product-Location view within the Manage Assortment workspace.

### **Fixed TS 3 Units**

The Fixed TS 3 Units is an editable measure used to indicate an initial allocation for the product and location combination. For more details, refer to the same measure in the Product-Location view within the Manage Assortment workspace.

### **Tot. Init. Fcst Units**

The Tot. Init. Fcst Units is a loaded measure used to display the total initial forecast for the product and location combination.

### **Conversion UOM 1**

The Conversion UOM 1 is an editable measure used to indicate a value to be used when converting units into a specific unit of measure based on the Constraint UOM 1 for scaling. In this view, the value is the total for the product.

### **Conversion UOM 2**

The Conversion UOM 2 is an editable measure used to indicate a value to be used when converting units into a specific unit of measure based on the Constraint UOM 1 for scaling. In this view, the value is the total for the product.

### **Conversion UOM 3**

The Conversion UOM 3 is an editable measure used to indicate a value to be used when converting units into a specific unit of measure based on the Constraint UOM 1 for scaling. In this view, the value is the total for the product.

### **Avg. Cost €**

The Avg. Cost € is an editable measure used to indicate the average cost for the product and location combination. In this view, the value is the average for the product considering all the locations.

### **Price (excl.VAT) €**

The Price (excl.VAT) € is an editable measure used to indicate the price excluding VAT for the product and location combination. In this view, the value is the average for the product considering all the locations.

#### **Primary Source @ Today**

The Primary Source @ Today is a loaded measure used to indicate the applied primary source for the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

#### **Reserved Source 1 @ Today**

The Reserved Source 1 @ Today is a calculated measure used to indicate the applied reserved source 1 for the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

#### **Reserved Source 2 @ Today**

The Reserved Source 2 @ Today is a calculated measure used to indicate the applied reserved source 2 for the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

#### **Alternative Source @ Today**

The Alternative Source @ Today is a calculated measure used to indicate the applied alternative source for the product and location combination at the system date and can be overridden. .

#### **LLC @ Today**

The LLC @ Today is a calculated measure used to indicate the low level code applied to the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

#### **Lead Time @ Today Dur (d)**

The Lead Time @ Today Dur (d) is a calculated measure used to indicate the applied lead time, in days, for the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

#### **Revw @ Today**

The Revw @ Today is a calculated measure used to indicate if Today (current system date) is a review day for the product and location combination and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

#### **Next Revw @ Today Date**

The Next Revw @ Today Date is a calculated measure used to indicate the next review date for the product and location combination. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

#### **Next Revw @ Today Dur (d)**

The Next Revw @ Today Dur (d) is a calculated measure used to indicate the number of days to the next review date for the product and location combination. For more details about the

measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Avg Revw Time @ Today Dur (d)**

The Avg Revw Time @ Today Dur (d) is a calculated measure used to indicate the average number of days between each review period (planning period) for the product and location combination. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**RUTL Mask**

The RUTL Mask is the same as the one in the availability profile. Refer to the measure, RUTL Mask, in the Availability Profile Measures.

**Min Cred. Qty @ Today Units**

The Min Cred. Quantity @ Today Units is a calculated measure used to indicate the Minimum Credible Quantity applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**ROL Meth. @ Today**

The ROL Meth. @ Today is a calculated measure used to indicate the ROL method applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Min Qty @ Today Units**

The Min Quantity @ Today Units is a calculated measure used to indicate the ROL minimum quantity units applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Min TS @ Today Dur (d)**

The Min TS @ Today Dur (d) is a calculated measure used to indicate the ROL minimum time supply (in days) applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Tgt. SL @ Today %**

The Tgt. SL @ Today % is a calculated measure used to indicate the Target Service Level % applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Volatility @ Today %**

The Volatility @ Today % is a calculated measure used to indicate the Volatility % applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**ROL Sft. Time @ Today Dur (d)**

The ROL Sft. Time @ Today Dur (d) details the Reorder level safety time duration applicable today based on rules association and used in replenishment calculations where RUTL method

is not Target Stock. The ROL level is determined as lead time + review time + ROL Sft Time @ Today Dur (d).

**RUTL Meth. @ Today**

The RUTL Meth. @ Today is a calculated measure used to indicate the RUTL method applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Max Qty @ Today Units**

The Max Quantity @ Today Units is a calculated measure used to indicate the RUTL maximum quantity units applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Max TS @ Today Dur (d)**

The Max TS @ Today Dur (d) is a calculated measure used to indicate the RUTL maximum time supply (in days) applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Tgt. DoS @ Today Dur (d)**

The Tgt. DoS @ Today Dur (d) is a calculated measure used to indicate the Target Days of Supply (in days) applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**TS Meth. @ Today**

The TS Meth. @ Today is a calculated measure used to indicate the target stock method applied to the product and location combination at the system date (when the RUTL method is target stock). For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**TS Seas. Fcst @ Today %**

TS Seas. Fcst @ Today % is a calculated measure used to indicate the percentage of the Seasonal Forecast applied to the product and location combination at the system date (to be used when the RUTL method is target stock). For more details about the measure, refer to the same measure description in the view SKU- LOC within the Supply Chain Network workspace.

**TS Sft. Time @ Today Dur (d)**

The TS Sft. Time @ Today Dur (d) is a calculated measure used to indicate the number of days for the stock safety applied to the product and location combination at the system date (to be used when the RUTL method is target stock). For more details about the measure, refer to the same measure description in the view SKU- LOC within the Supply Chain Network workspace.

**Order Rounding Threshold @ Today**

The Order Rounding Threshold @ Today is a calculated measure used to indicate the percentage to round up the orders applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Repl. Status @ Today**

The Repl. Status @ Today is a calculated measure used to indicate whether the product and location combination at the system date is replenishable or not. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**ROL Chng @ Today %**

The ROL Chng @ Today % is a calculated measure used to indicate the percentage to increase or decrease the system-generated ROL value applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**RUTL Chng @ Today %**

The RUTL Chng @ Today % is a calculated measure used to indicate the percentage to increase or decrease the system-generated RUTL value applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Rpl. Dest. Mask**

The Rpl. Dest. Mask is the same as the one in the availability profile. Refer to the measure, Rpl. Dest. Mask, in the Measures: Availability Profile in the Default Profile Measures.

**Rpl. Src. Mask**

The Rpl. Src. Mask is the same as the one in the availability profile. Refer to the measure, Rpl. Src. Mask, in the Measures: Availability Profile in the Default Profile Measures.

**Avail. Constr. (Src) @ Today**

The Avail. Constr. (Src) @ Today is a calculated measure used to indicate whether a constraint is enabled or disabled (at the source location) for the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Src. Avail. (Src) @ Today**

The Src. Avail. (Src) @ Today is a calculated measure used to indicate which stock units to be used from the source locations are applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Src. Avail. (Src) @ Today Dur (d)**

The Src. Avail. (Src) @ Today Dur (d) is a calculated measure used to indicate the number of days to get the in-transit and on-order stock applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Rpl. Active (Dst) @ Today**

The Rpl. Active (Dst) @ Today is a calculated measure used to indicate for the product and location combination at the system date if the location has the replenishment active or not. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Fulfill Till Layer (Dst) @ Today**

The Fulfill Till Layer (Dst) @ Today is a calculated measure used to indicate the layer applied to the product and location combination at the system date (layer until which IPOCS-Lifecycle Allocation and Replenishment should fulfill the demand). For more details about the measure,

refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Ration. Prio (Dst) @ Today**

The Ration. Prio (Dst) @ Today is a calculated measure used to indicate the rationing priority applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**SubLayer (Dst) @ Today**

The SubLayer (Dst) @ Today is a calculated measure used to indicate the sublayers applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Assign Pack (Dst) @ Today**

The Assign Pack (Dst) @ Today is a calculated measure used to indicate the pack types assignment applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Min Pack Fill Rate 1 (Dst) @ Today %**

The Min Pack Fill Rate 1 (Dst) @ Today % is a calculated measure used to indicate the minimum pack fill rate percentage for the first round of complex pack assignments applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Min Pack Fill Rate 2 (Dst) @ Today %**

The Min Pack Fill Rate 2 (Dst) @ Today % is a calculated measure used to indicate the minimum pack fill rate percentage for the second round of complex pack assignments applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**SKU Level (R & A) View - Plan Profile Measures**

The Plan measure profile available in the SKU Level (R & A) view contains the following measures.

**User Filter PROD - LOC**

The User Filter PROD - LOC is the same as the one in the default profile. Refer to the measure User Filter PROD-LOC in the Default Profile Measures.

**RUTL Mask**

The RUTL Mask is the same as the one in the availability profile. Refer to the measure, RUTL Mask, in the Availability Profile Measures.

**Rpl. Dest. Mask**

The Rpl. Dest. Mask is the same as the one in the availability profile. Refer to the measure, Rpl. Dest. Mask, in the Availability Profile Measures.

**Rpl. Src. Mask**



The Rpl. Src. Mask is the same as the one in the availability profile. Refer to the measure, Rpl. Src. Mask, in the Availability Profile Measures.

**Pack Partition**

The Pack Partition is a calculated measure used to indicate a partition (identifier) for the products that belong to the same pack. For example, if pack 001 has sku001, sku002 and sku003 then all 3 SKUs have the same pack partition value.

**Tot. Physical Avail. Units**

The Tot. Physical Avail. Units is the same as the one in the availability profile. Refer to the measure, Tot. Physical Avail. Units, in the Availability Profile Measures.

**Tot. Physical Avail. Dur (w)**

The Tot. Physical Avail. Dur (w) is the same as the one in the availability profile. Refer to the measure, Tot. Physical Avail. Dur (w), in the Availability Profile Measures.

**Tot. Dest. Avail. Units**

The Tot. Dest. Avail. Units is the same as the one in the default profile. Refer to the measure, Tot. Dest. Avail. Units, in the Default Profile Measures.

**Tot. Dest. Avail. Dur (w)**

Tot. Dest. Avail. Dur (w) is a calculated measure used to indicate the number of weeks that the Tot. Dest. Avail. Units can cover the demand for the product and location combination.

**Tot. Src. Avail. Units**

The Tot. Src. Avail. Units is a calculated measure used to indicate the total quantity of units available at the source location for the product and location combination. In this view, the value is the total for the product.

**Tot. Src. Avail Pack Units**

The Tot. Src. Avail Pack Units is a calculated measure used to indicate the total quantity of pack units available at the source location for the product and location combination. In this view, the value is the total for the product.

**User Tot. Src. Avail. Units**

The User Tot. Src. Avail. Units is an editable measure you can use to enter the total quantity of units available at the source location for the product. The value of this measure overrides the measure Tot. Src. Avail. Unit.

**Manual Push Units**

The Manual Push Units is an editable measure you can use to enter the total quantity of units to be manually pushed from the source location to the destination locations for the product. The value is spread proportionally between all the product's destination locations.

**ROL @ Today Units**

The ROL @ Today Units is a calculated measure used to indicate the Reorder level (ROL) value in units for the product and location combination at the system date. In this view, the value is the total of all locations for the product.

**RUTL @ Today Units**

The RUTL @ Today Units is the same as the one in the default profile. Refer to the measure, RUTL @ Today Units, in the Default Profile Measures.

**Forecast Over LT+RT Units**

The Forecast Over LT+RT Units is the same as the one in the forecast profile. Refer to the measure, Forecast Over LT+RT Units, in the Forecast Profile Measures.

**Unc. Need Total Units**

The Unc. Need Total Units is the same as the one in the default profile. Refer to the measure, Unc. Need Total Units, in the Default Profile Measures.

**Min Unc. Need Pack Units**

The Min Unc. Need Pack Units is a measure that indicates the minimum unit of Packs needed regardless of Pack Fill Rate.

**Max Unc. Need Pack Units**

The Max Unc. Need Pack Units is a measure that indicates the maximum unit of Packs needed regardless of Pack Fill Rate.

**User Rpl. Fix Locked Units**

The User Rpl. Fix Locked Units is an editable measure you can use to enter fixed replenishment units (order quantity) for the product. This measure overrides the product's system-calculated replenishment units. The entered value is spread proportionally between all the product's destination locations.

**Sys. Rpl. Plan In Units**

The Sys. Rpl. Plan In Units is the same as the one in the default profile. Refer to the measure, Sys. Rpl. Plan In Units, in the Default Profile Measures.

**Sys. Rpl. Plan In Pack Units**

The Sys. Rpl. Plan In Pack Units is the same as the one in the default profile. Refer to the measure, Sys. Rpl. Plan In Pack Units, in the Default Profile Measures.

**Unc. Req. Total Units**

The Unc. Req. Total Units is a calculated measure used to indicate the total unconstrained quantity, in units, needed for the source location (for example, warehouse). In this view, the value is the total for the product.

**Sys. Rpl. Plan Out Units**

The Sys. Rpl. Plan Out Units is the same as the one in the default profile. Refer to the measure, Sys. Rpl. Plan Out Units, in the Default Profile Measures.

**Sys. Rpl Plan Out Pack Units**

The Sys. Rpl Plan Out Pack Units is a calculated measure used to indicate the pack order quantity (either simple or complex packs) for the source location based on the source location needs. This value is calculated based on the replenishment rules and the source location demand. In this view, the value is the total of all source locations for the product.

**Tot. Avail Units**

The Tot. Avail Units is the same as the one in the availability profile. Refer to the measure, Tot. Avail. Units, in the Availability Profile Measures.

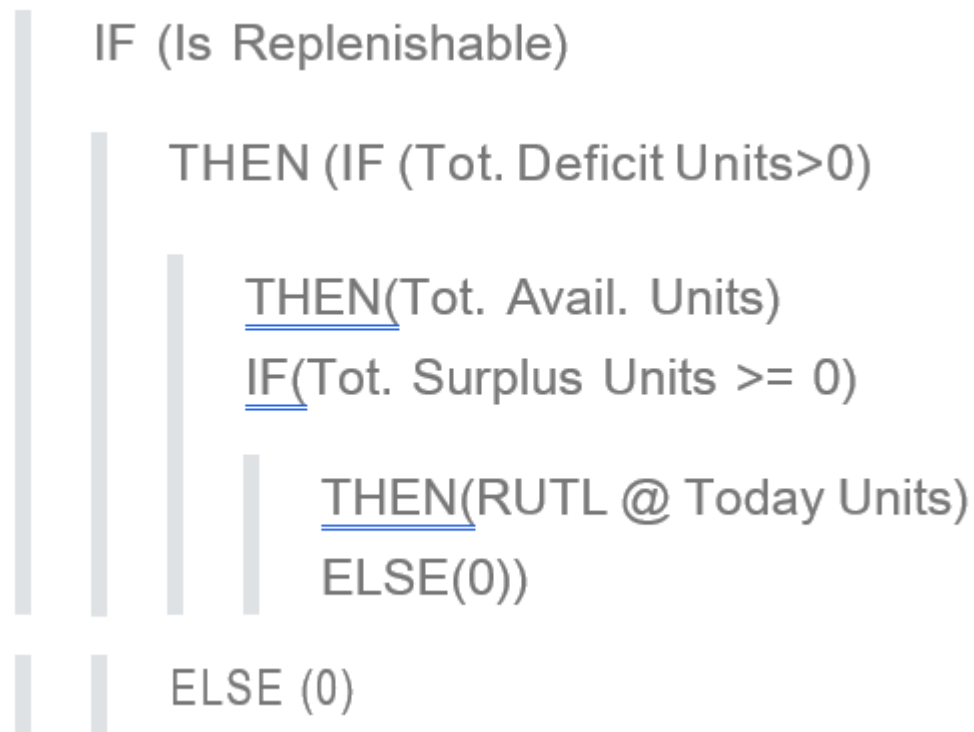
**Tot. Avail Dur (w)**

The Tot. Avail Dur (w) is the same as the one in the availability profile. Refer to the measure, Tot. Avail. Dur (w), in the Availability Profile Measures.

### Tot. Regular Units

The Tot. Regular Units is a calculated measure used to indicate the total regular units for the product. The calculation is based on the deficit and surplus units.

**Figure 21-19 Calculation**



### Tot. Deficit Units

The Tot. Deficit Units is the same as the one in the default profile. Refer to the measure, Tot. Deficit Units, in the Default Profile Measures.

### Tot. Deficit %

The Tot. Deficit % is a calculated measure used to indicate the percentage that the deficit units represent in the RUTL units.

**Figure 21-20 Calculation**

$$100 * \frac{\text{Tot. DeficitUnits}}{\text{RUTL@TodayUnits}}$$

### Tot. Surplus Units

The Tot. Surplus Units is the same as the one in the default profile. Refer to the measure, Tot. Surplus Units, in the Default Profile Measures.

**Tot. Surplus %**

The Tot. Surplus % is a calculated measure used to indicate the percentage that the surplus units represent in the RUTL units.

**Figure 21-21 Calculation**

$$100 * \frac{Tot. SurplusUnits}{RUTL@TodayUnits}$$

**Tot. Fulfil. %**

The Tot. Fulfil. % is a calculated measure used to indicate the percentage that the total available stock fulfills the RUTL.

**Rpl. TBA**

The Rpl. TBA is a calculated measure used to indicate whether the product and location combination needs the order to be approved manually. In this view, the value is the total of all locations for the product.

**Appr. Rpl. Plan**

The Appr. Rpl. Plan is an editable measure used to indicate whether the product's order should or should not be approved by the approval process. The **Replenishment Approval** action button approves all orders when this measure is selected.

**Appr. Rpl Plan User ID**

The Appr. Rpl Plan User ID is a calculated measure used to audit the **Replenishment Approval** action button. It is populated with the user-identifier that last ran the Replenishment Approval.

**Appr. Rpl. Plan Date**

Appr. Rpl. Plan Date is a calculated measure used to audit the **Replenishment Approval** action button. It is populated with the date and time that the replenishment approval was last run.

**Appr. Rpl. Plan In Units**

The Appr. Rpl. Plan In Units is the same as the one in the availability profile. Refer to the measure, Appr. Rpl. Plan In Units, in the Availability Profile Measures.

**Appr. Rpl. Plan In Pack Units**

The Appr. Rpl. Plan In Pack Units is the same as the one in the availability profile. Refer to the measure, Appr. Rpl. Plan In Pack Units, in the Availability Profile Measures.

**Appr. Rpl. Plan Out Units**

The Appr. Rpl. Plan Out Units is the same as the one in the availability profile. Refer to the measure, Appr. Rpl. Plan Out Units, in the Measures: Availability Profile in the Default Profile Measures.

**Exp. Rpl. Plan Date**

The Exp. Rpl. Plan Date is a calculated measure used to audit the replenishment export. It is populated with the date and time that the replenishment was exported by the batch, if exported by the last batch run. Otherwise, it is empty.

#### **Exp Rpl. Plan In Units**

The Exp Rpl. Plan In Units is the same as the one in the availability profile. Refer to the measure, Exp. Rpl. Plan In Units, in the Availability Profile Measures.

#### **Exp. Rpl. Plan Out Units**

The Exp. Rpl. Plan Out Units is the same as the one in the availability profile. Refer to the measure, Exp. Rpl. Plan Out Units, in the Availability Profile Measures.

#### **SKU Level (R & A) View - Replacement Profile Measures**

The Replacement measure profile available in the SKU Level (R & A) view contains the following measures.

#### **User Filter PROD - LOC**

The User Filter PROD - LOC is the same as the one in the default profile. Refer to the measure User Filter PROD-LOC in the Default Profile Measures.

#### **Phs. Out PROD**

The Phs. Out PROD is an editable measure used to select the phase-out product for the current product. You can select the product from a picklist populated with all available products within the workspace.

#### **Phs. Out Subst. Date**

The Phs. Out Subst. Date is an editable measure used to select the substitution date for the phased-out product.

#### **Tot. On Hand Units**

The Tot. On Hand Units is the same as the one in the availability profile. Refer to the measure, Tot. On Hand Units, in the Availability Profile Measures.

#### **Tot. Booked Units**

The Tot. Booked Units is the same as the one in the inventory profile. Refer to the measure, Tot. Booked Units, in the Inventory Profile Measures.

#### **Tot. In Transit Units**

The Tot. In Transit Units is the same as the one in the inventory profile. Refer to the measure, Tot. In Transit Units, in the Inventory Profile Measures.

#### **Tot. In Transit**

The Tot. In Transit is the same as the one in the inventory profile. Refer to the measure, Tot. In Transit, in the Inventory Profile Measures.

#### **Tot. On Order (in) Units**

The Tot. On Order (in) Units is the same as the one in the inventory profile. Refer to the measure, Tot. On Order (out) Units, in the Inventory Profile Measures.

#### **Tot. On Order (out) Units**

The Tot. On Order (out) Units is the same as the one in the inventory profile. Refer to the measure, Tot. On Order (out) Units, in the Inventory Profile Measures.

**Tot. Cust. Order Units**

The Tot. Cust. Order Units is the same as the one in the inventory profile. Refer to the measure, Tot. Cust. Order Units, in the Inventory Profile Measures.

**Loc. On Hand Units**

The Loc. On Hand Units is the same as the one in the inventory profile. Refer to the measure, Loc. On Hand Units, in the Inventory Profile Measures.

**Loc. Booked Units**

The Loc. Booked Units is the same as the one in the inventory profile. Refer to the measure, Loc. Booked Units, in the Inventory Profile Measures.

**Loc. In Transit Units**

The Loc. In Transit Units is the same as the one in the inventory profile. Refer to the measure, Loc. In Transit Units, in the Inventory Profile Measures.

**Loc. In Transit**

The Loc. In Transit is the same as the one in the inventory profile. Refer to the measure, Loc. In Transit in the Inventory Profile Measures.

**Loc. On Order (in) Units**

The Loc. On Order (in) Units is the same as the one in the inventory profile. Refer to the measure, Loc. On Order (in) Units, in the Inventory Profile Measures.

**Loc. On Order (out) Units**

Loc. On Order (out) Units is the same as the one in the inventory profile. Refer to the measure, Loc. On Order (out) Units, in the Inventory Profile Measures.

**Cust. Order Units**

The Cust. Order Units is the same as the one in the inventory profile. Refer to the measure, Cust. Order Units, in the Inventory Profile Measures.

**Ph. Out On Hand Units**

The Ph. Out On Hand Units is the same as the one in the inventory profile. Refer to the measure, Ph. Out On Hand Units, in the Inventory Profile Measures.

**Ph. Out Booked Units**

The Ph. Out Booked Units is the same as the one in the inventory profile. Refer to the measure, Ph. Out Booked Units, in the Inventory Profile Measures.

**Ph. Out In Transit Units**

The Ph. Out In Transit Units is the same as the one in the inventory profile. Refer to the measure, Ph. Out In Transit Units, in the Inventory Profile Measures.

**Ph. Out In Transit**

The Ph. Out In Transit is the same as the one in the inventory profile. Refer to the measure, Ph. Out In Transit in the Inventory Profile Measures.

**Ph. Out On Order (in) Units**

The Ph. Out On Order (in) Units is the same as the one in the inventory profile. Refer to the measure, Ph. Out On Order (in) Units, in the Inventory Profile Measures.

### **Ph. Out On Order (out) Units**

The Ph. Out On Order (out) Units is the same as the one in the inventory profile. Refer to the measure, Ph. Out On Order (out) Units, in the Inventory Profile Measures.

### **Ph. Out Cust. Order Units**

The Ph. Out Cust. Order Units is the same as the one in the inventory profile. Refer to the measure, Ph. Out Cust. Order Units, in the Inventory Profile Measures.

### **SKU Level (R & A) View - YTDYTG Profile Measures**

The Year-To-Date Year-To-Go (YTDYTG) measure profile available in the SKU Level (R & A) view contains the following measures.

#### **User Filter PROD - LOC**

The User Filter PROD - LOC is the same as the one in the default profile. Refer to the measure User Filter PROD-LOC in the Default Profile Measures.

#### **Tot. Init. Fcst Units**

The Tot. Init. Fcst Units is the same as the one in the parameters profile. Refer to the measure, Tot. Init. Fcst Units, in the Parameters Profile Measures.

#### **Actual Loc. Sales Units**

The Actual Loc. Sales Units is the same as the one in the actuals profile. Refer to the measure, Actual Loc. Sales Units, in the Actuals Profile Measures.

#### **Sell-Out Fcst (Wk) Units**

The Sell-Out Fcst (Wk) Units is the same as the one in the forecast profile. Refer to the measure, Sell-Out Fcst (Wk) Units, in the Forecast Profile Measures.

#### **Lifecycle Sales To-Date %**

The Lifecycle Sales To-Date % is the same as the one in the default profile. Refer to the measure, Lifecycle Sales To-Date %, in the Default Profile Measures.

#### **Lifecycle Sales To-Go %**

The Lifecycle Sales To-Go % is the same as the one in the default profile. Refer to the measure, Lifecycle Sales To-Go %, in the Default Profile Measures.

#### **Actual Loc. Recpt Units**

The Actual Loc. Recpt Units is the same as the one in the actuals profile. Refer to the measure, Actual Loc. Recpt Units, in the Actuals Profile Measures.

#### **Actual Loc. Shipmt Units**

The Actual Loc. Shipmt Units is the same as the one in the actuals profile. Refer to the measure, Actual Loc. Shipmt Units, in the Actuals Profile Measures.

#### **Lifecycle Receipt To-Date %**

The Lifecycle Receipt To-Date % is a calculated measure used to indicate the percentage of actual receipts up to date against the total initial forecast.

Figure 21-22 Calculation

$$100 * \frac{\sum_{\text{firstweek}}^{\text{currentweek}} \text{ActualLoc. RecptUnits}}{\text{Tot. Init. FcstUnits}}$$

**Lifecycle Sell-Thru %**

The Lifecycle Sell-Thru % is a calculated measure used to indicate the percentage of lifecycle product's sell-through.

Figure 21-23 Calculation

$$100 * \frac{\sum_{\text{firstweek}}^{\text{currentweek}} \text{ActualSalesUnits}}{\sum_{\text{firstweek}}^{\text{currentweek}} \text{ActualLoc. RecptUnits}}$$

## SKU-LOC Level (R & A) View

The **SKU-LOC Level (R & A) View**, under the **By Prod** tab, is similar to the view SKU Level (R & A) but allows you to do the review at the product and location levels.

The navigation of this view is driven by real-time alerts or workspace alerts. To leverage the real-time alert navigation in this workspace the desired alerts should be enabled as RTA (measure Enable RTA) in the To-Do List view.

Figure 21-24 SKU-LOC Level (R & A) View

Location	User Filter	Revid	PROD - LOC Alerts	Tot. Avail. Units	Tot. Avail. Units	Forecast Over LT+RT Dur (w)	R/TL Today Units	Unc. Total Units	User Rpt. Fin Locked Units	Sys. Rpt. Plan In Units	Sys. Rpt. Plan In Pack Units	Rpt. TBA	Appr. Rpt. Plan
Mid-Atlantic			MaxStk MinDisp ShtageCurr		w	64.79	16	16					
w1004 Regional Warehouse 4					w	438.59	439	439		439			
w1004 Regional Warehouse 4					w	438.59	439	439		439			

Regular Units	Tot. Deficit Units	Tot. Deficit %	Tot. Surplus Units
439	16	100.0 %	
439		%	



### **SKU-LOC Level (R & A) View - Default Profile Measures**

The Default measure profile available in the SKU-LOC Level (R & A) view contains the following measures.

#### **User Filter PROD-LOC**

The User Filter PROD-LOC is an editable measure used to include specific product and location combinations into the quick filter. When selected, the quick filter restricts the condition to search only for the product and location combinations selected. When clear, the product and location combinations are not included in the filter condition.

#### **Revwd PROD - LOC**

The Revwd PROD - LOC is an editable measure used to indicate that the product and location combination alerts have been reviewed.

#### **PROD - LOC Alerts**

The PROD - LOC Alerts is a calculated measure used to display the Alert Short Descr. for all alerts that were triggered for the product and location combination.

#### **Tot. Dest. Avail. Units**

The Tot. Dest. Avail. Units is a calculated measure used to indicate the total quantity of units available at the location for the product and location combination.

#### **Tot. Dest. Avail. Dur (w)**

The Tot. Dest. Avail. Dur (w) is a calculated measure used to indicate the number of weeks that the Tot. Dest. Avail. Units can cover the demand for the product and location combination.

#### **Forecast Over LT+RT Units**

The Forecast Over LT+RT Units is a calculated measure to display the daily Forecast Demand for the product and location combination, in units, from the system date up to the number of days of Lead Time plus Review Time. The system date is available in the Today view.

#### **RUTL @ Today Units**

The RUTL @ Today Units is a calculated measure used to indicate the Reorder Up-to Level (RUTL) value in units for the product and location combination at the system date.

#### **Unc. Need Total Units**

The Unc. Need Total Units is a calculated measure used to indicate the total unconstrained quantity, in units, needed at the location for the product and location combination.

#### **User Rpl. Fix Locked Units**

The User Rpl. Fix Locked Units is an editable measure used to enter fixed replenishment units (order quantity) for the product and location combination. This measure overrides the product's system-calculated replenishment units.

#### **Sys. Rpl. Plan In Units**

The Sys. Rpl. Plan In Units is a calculated measure used to indicate the order quantity for the product and location combination based on the location needs. This value is calculated based on the replenishment rules and the available forecast.

#### **Sys. Rpl. Plan In Pack Units**

The Sys. Rpl. Plan In Pack Units is a calculated measure used to indicate the pack order quantity for the product and location combination based on the location needs. This value is calculated based on the replenishment rules and the available forecast.

**Rpl. TBA**

The Rpl. TBA is a calculated measure used to indicate whether the product and location combination needs the order to be approved manually.

**Appr. Rpl. Plan**

The Appr. Rpl. Plan is an editable measure used to indicate whether the product and location combination order should be approved or not by the approval process. The **Replenishment Approval** action button approves all orders when this measure is selected.

**Appr. Rpl. Plan In Units**

The Appr. Rpl. Plan In Units is a calculated measure used to indicate the approved replenishment planned units for the product and location combination.

**Tot. Avail. Units**

The Tot. Avail. Units is a calculated measure used to indicate the total quantity of units available for the product and location combination taking into consideration all inventory (booked, on-hand, transit and on-order) plus all orders (approved, planned, and exported) plus all transfers (approved, planned, and exported).

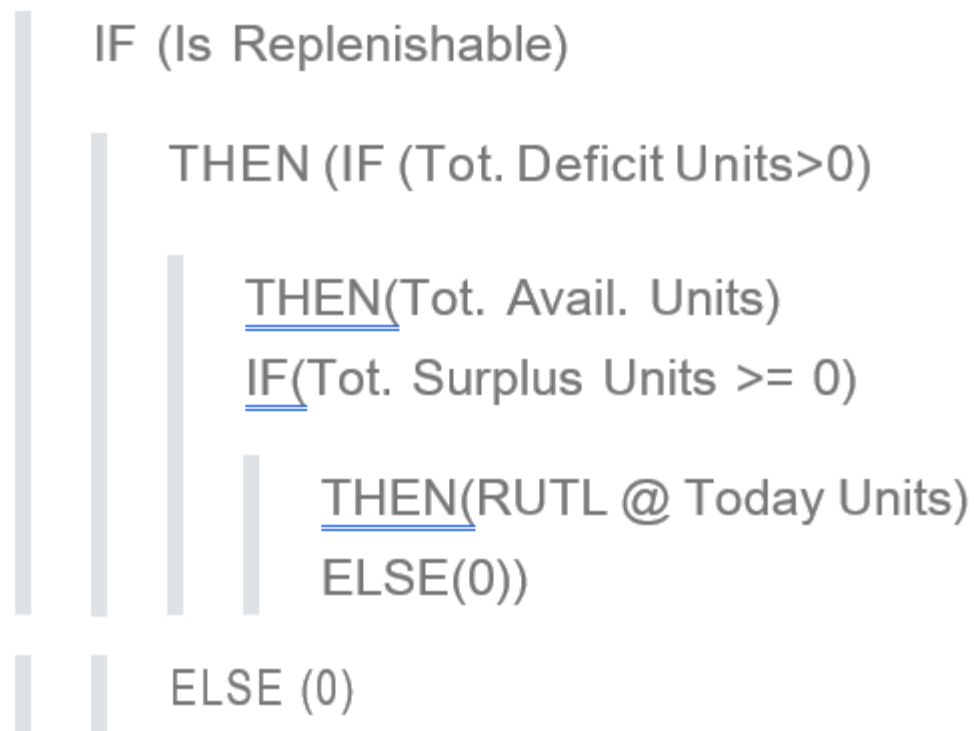
**Tot. Avail. Dur (w)**

The Tot. Avail. Dur (w) is a calculated measure used to indicate the number of weeks that the Tot. Avail. Units can cover the demand for the product and location combination.

**Tot. Regular Units**

The Tot. Regular Units is a calculated measure used to indicate the total regular units for the product. The calculation is based on the deficit and surplus units for the product and location combination.

**Figure 21-25 Calculation**



**Tot. Deficit Units**

The Tot. Deficit Units is a calculated measure used to indicate the inventory deficit using the total available inventory and Reorder Up-to Level (RUTL) value for the product and location combination.

**Figure 21-26 Calculation**

$$\text{Max}(RUTL@TodayUnits - Tot. Avail. Units, 0)$$

**Tot Deficit %**

The Tot Deficit % is a calculated measure used to indicate the percentage that the deficit units represent in the RUTL units for the product and location combination.

**Figure 21-27 Calculation**

$$100 * \frac{Tot. DeficitUnits}{RUTL@TodayUnits}$$

### Tot. Surplus Units

The Tot. Surplus Units is a calculated measure used to indicate the inventory surplus using the total available inventory and Reorder Up-to Level (RUTL) value for the product and location combination.

#### Figure 21-28 Calculation

$$\text{Max}\left(\sum_{\text{allocations}} (\text{Tot. Avail. Units} - \text{RUTL@TodayUnits}), 0\right)$$

### Tot. Surplus %

The Tot. Surplus % is a calculated measure used to indicate the percentage that the surplus units represent in the RUTL units for the product and location combination.

#### Figure 21-29 Calculation

$$100 * \frac{\text{Tot. SurplusUnits}}{\text{RUTL@TodayUnits}}$$

### Tot. Fulfil. %

The Tot. Fulfil. % is a calculated measure used to indicate the percentage that the total available stock fulfills the RUTL for the product and location combination.

#### Figure 21-30 Calculation

$$100 * \frac{\text{Tot. Avail. Units}}{\text{RUTL@TodayUnits}}$$

### Lifecycle Sales To-date %

The Lifecycle Sales To-date % is a calculated measure used to indicate the percentage of actual sales up to date against the total initial forecast for the product and location combination.

#### Figure 21-31 Calculation

$$100 * \frac{\sum_{\text{firstweek}}^{\text{currentweek}} \text{ActualLoc. SalesUnits}}{\text{Tot. Init. FcstUnits}}$$

**Lifecycle Sales To-Go %**

The Lifecycle Sales To-Go % is a calculated measure used to indicate the percentage of sales to complete the total initial forecast for the product and location combination.

**Figure 21-32 Calculation**

$$100 * \frac{\sum_{\text{currentweek}}^{\text{horizon}} \text{ActualLoc. SalesUnits} + \text{SellOutFcst(Wk)Units}}{\text{Tot. Init. FcstUnits}}$$

**SKU-LOC Level (R & A) - Measures: Actuals Profile**

The Actuals measure profile available in the SKU-LOC Level (R & A) view contains the following measures.

**User Filter PROD - LOC**

The User Filter PROD - LOC is the same as the one in the default profile. Refer to the measure User Filter PROD-LOC in the Default Profile Measures.

**Actual PL Sales Wk Units**

The Actual PL Sales Wk Units is a calculated measure used to indicate the weekly sales, aggregated from the daily sales, for the product and location combination.

**Actual Loc. Sales Units**

The Actual Loc. Sales Units is a calculated measure used to indicate the weekly sales, aggregated from the daily sales, for the product and location combination.

**Actual Loc. Recpt Units**

The Actual Loc. Recpt Units is a calculated measure used to indicate the weekly receipts for the product and location combination.

**Actual Loc. Shipmt Units**

The Actual Loc. Shipmt Units is a calculated measure used to indicate the weekly shipments for the product and location combination.

**Actual Sales W-4 Units**

The Actual Sales W-4 Units is a calculated measure used to display the accumulated daily sales units at the system date week - 4 weeks for the product and location combination. The system date is available in the Today view.

**Actual Sales W-3 Units**

The Actual Sales W-3 Units is a calculated measure used to display the accumulated daily sales units at the system date week - 3 weeks for the product and location combination. The system date is available in the Today view.

**Actual Sales W-2 Units**

The Actual Sales W-2 Units is a calculated measure used to display the accumulated daily sales units at the system date week - 2 weeks for the product and location combination. The system date is available in the Today view.

**Actual Sales W-1 Units**

The Actual Sales W-1 Units is a calculated measure used to display the accumulated daily sales units at the system date week - 1 weeks for the product and location combination. The system date is available in the Today view.

**Actual Sales W+0 Units**

The Actual Sales W+0 Units is a calculated measure used to display the accumulated daily sales units for the current system date week for the product and location combination. The system date is available in the Today view.

**Actual Sales W+1 Units**

The Actual Sales W+1 Units is a calculated measure used to display the accumulated daily sales units for the current system date week + 1 week for the product and location combination. The system date is available in the Today view

**Actual Sales W+2 Units**

The Actual Sales W+2 Units is a calculated measure used to display the accumulated daily sales units for the current system date week + 2 weeks for the product and location combination. The system date is available in the Today view.

**Actual Sales W+3 Units**

The Actual Sales W+3 Units is a calculated measure used to display the accumulated daily sales units for the current system date week + 3 weeks for the product and location combination. The system date is available in the Today view.

**Actual Sales W-1 to W+0 Units**

The Actual Sales W-1 to W+0 Units is a calculated measure used to display the accumulated sales units from the system date week – 1 until the system current week for the product and location combination. The system date is available in the Today view.

**Actual Sales W-2 to W+0 Units**

The Actual Sales W-2 to W+0 Units is a calculated measure used to display the accumulated sales units from the system date week – 2 until the system current week for the product and location combination. The system date is available in the Today view.

**Actual Sales W-3 to W+0 Units**

The Actual Sales W-3 to W+0 Units is a calculated measure used to display the accumulated sales units from the system date week – 3 until the system current week for the product and location combination. The system date is available in the Today view.

**Actual Sales W-4 to W+0 Units**

The Actual Sales W-4 to W+0 Units is a calculated measure used to display the accumulated sales units from the system date week – 4 until the system current week for the product and location combination. The system date is available in the Today view.

**Actual Lost Sales W-4 to W-1 Units**

The Actual Lost Sales W-4 to W-1 Units is a calculated measure used to display the accumulated lost sales units from the system date week – 4 until the previous week (from the system date week) for the product and location combination. The system date is available in the Today view.

**Actual Sales D-7 Units**

The Actual Sales D-7 Units is a calculated measure used to display the accumulated daily sales units for the last 7 days (from the system date - 7days until system date) for the product and location combination. The system date is available in the Today view.

#### **Actual Sales D-15 Units**

The Actual Sales D-15 Units is a calculated measure used to display the accumulated daily sales units for the last 15 days (from the system date - 15days until system date) for the product and location combination. The system date is available in the Today view.

#### **Actual Sales D-30 Units**

The Actual Sales D-30 Units is a calculated measure used to display the accumulated daily sales units for the last 30 days (from the system date - 30days until system date) for the product and location combination. The system date is available in the Today view.

#### **Actual Avg Inv. W-1 Units**

The Actual Avg Inv. W-1 Units is a calculated measure used to display the average inventory units at the previous week (system date week - 1 week) for the product and location combination. The system date is available in the Today view.

#### **Actual Avg Inv. W-2 Units**

The Actual Avg Inv. W-2 Units is a calculated measure used to display the average inventory units at the system date week - 2 weeks for the product and location combination. The system date is available in the Today view.

#### **Actual Avg Inv. W-3 Units**

The Actual Avg Inv. W-3 Units is a calculated measure used to display the average inventory units at the system date week - 3 weeks for the product and location combination. The system date is available in the Today view.

#### **Actual Avg Inv. W-4 Units**

The Actual Avg Inv. W-4 Units is a calculated measure used to display the average inventory units at the system date week - 4 weeks for the product and location combination. The system date is available in the Today view.

#### **Actual PL Avg Inv. Wk Units**

The Actual PL Avg Inv. Wk Units is a calculated measure used to display the average holding inventory of the assortment period.

#### **SKU-LOC Level (R & A) - Measures: Availability Profile**

The Availability measure profile available in the SKU-LOC Level (R & A) view contains the following measures.

#### **User Filter PROD-LOC**

The User Filter PROD-LOC is the same as the one in the default profile. Refer to the measure User Filter PROD-LOC in the Default Profile Measures.

#### **RUTL Mask**

The RUTL Mask is a calculated measure used to indicate whether the product and location combination is eligible for replenishment. When selected, then it is eligible. When clear, then it is ineligible.

#### **Rpl. Dest. Mask**

The Rpl. Dest. Mask is a calculated measure used to indicate whether the product and location combination is eligible for replenishment and the constraint parameter at the system date indicates that replenishment is enable too (measure Rpl. Active (Dst) @ Today). When selected, then it is eligible. When clear, then it is ineligible.

**Rpl. Src. Mask**

The Rpl. Src. Mask is a calculated measure used to indicate whether the product and source location combination is eligible to be used for replenishment. When selected, then it is eligible. When clear, then it is ineligible.

**Tot. On Hand Units**

The Tot. On Hand Units is a calculated measure used to indicate the total on-hand inventory units for the product and location combination. The total on-hand units includes the on-hand inventory loaded into IPOCS-Lifecycle Allocation and Replenishment plus the on-hand inventory units for the replacement/phase-out product, if any.

**In Transit over LT+RT Units**

In Transit over LT+RT Units is a calculated measure used to indicate the total in transit units over the lead time plus the review time for the product and location combination.

**On Order (in) over LT+RT Units**

The On Order (in) over LT+RT Units is a calculated measure used to indicate the total on order (in) units over the lead time plus the review time for the product and location combination.

**Exp. Rpl. Plan In Units**

The Exp. Rpl. Plan In Units is a calculated measure used to indicate the replenishment planned units to be exported from the batch for the product and location combination.

**Appr. Rpl. Plan In Units**

The Appr. Rpl. Plan In Units is the same as the one in the default profile. Refer to the measure, Appr. Rpl. Plan In Units, in the Default Profile Measures.

**Appr. Rpl. Plan In Pack Units**

The Appr. Rpl. Plan In Pack Units is a calculated measure used to indicate the approved replenishment planned packs units for the product and location combination.

**Sys. Rpl. Plan In Units**

The Sys. Rpl. Plan In Units is the same as the one in the default profile. Refer to the measure, Sys. Rpl. Plan In Units, in the Default Profile Measures.

**Transfer Plan In Units**

The Transfer Plan In Units is a calculated measure used to indicate the transfer units planned for the product and location combination.

**Appr. Transfer In Units**

The Appr. Transfer In Units is a calculated measure used to indicate the transfer units approved for the product and location combination.

**Exp. Transfer Plan In Units**

The Exp. Transfer Plan In Units is a calculated measure used to indicate the transfer units to be exported from the batch for the product and location combination.

**On Order (out) over LT+RT Units**



The On Order (out) over LT+RT Units is a calculated measure used to indicate the total on orders (out) units over the lead time plus the review time for the product and location combination.

**Exp. Rpl. Plan Out Units**

The Exp. Rpl. Plan Out Units is a calculated measure used to indicate the source location (for example, warehouse) replenishment planned units to be exported from the batch for the product and location combination.

**Appr. Rpl. Plan Out Units**

The Appr. Rpl. Plan Out Units is a calculated measure used to indicate the source location approved replenishment units for the product and location combination.

**Sys. Rpl. Plan Out Units**

The Sys. Rpl. Plan Out Units is a calculated measure used to indicate the order quantity for the source location based on the source location needs. This value is calculated based on the replenishment rules and the source location demand.

**Transfer Plan Out Units**

The Transfer Plan Out Units is a calculated measure used to indicate the source location's transfer units planned for the product and location combination.

**Appr. Transfer Out Units**

Appr. Transfer Out Units is a calculated measure used to indicate the source location's transfer units approved for the product and location combination.

**Exp. Transfer Plan Out Units**

The Exp. Transfer Plan Out Units is a calculated measure used to indicate the source location's transfer units to be exported from the batch for the product and location combination.

**Tot. Dest. Avail. Units**

The Tot. Dest. Avail. Units is the same as the one in the default profile. Refer to the measure, Tot. Dest. Avail. Units, in the Default Profile Measures.

**Tot. Dest. Avail. Dur (w)**

The Tot. Dest. Avail. Dur (w) is the same as the one in the default profile. Refer to the measure, Tot. Dest. Avail. Dur (w), in the Default Profile Measures.

**Tot. Physical Avail. Units**

The Tot. Physical Avail. Units is a calculated measure used to indicate the total quantity of units' physically available at the location for the product and location combination. The physically available units differ from the available units as the booked inventory is taken into consideration.

**Figure 21-33 Calculation**

$$\textit{Tot. Dest. Avail. Units} - \textit{Tot. BookedUnits}$$

**Tot. Physical Avail. Dur (w)**

The Tot. Physical Avail. Dur (w) is a calculated measure used to indicate the number of weeks that the Tot. Physical Avail. Units can cover the demand for the product and location combination.

**Up To Dest. Avail Units**

The Up To Dest. Avail Units is the same as Tot. Dest. Avail Units grouped by source.

**Up To Dest. Avail Dur (w)**

The Up To Dest. Avail Dur (w) is the same as Tot. Dest. Avail Units grouped by source displayed by duration (weeks).

**Tot. Src. Avail. Units**

The Tot. Src. Avail. Units is a calculated measure used to indicate the total quantity of units available at the source location for the product and location combination.

**Tot. Src. Avail Pack Units**

The Tot. Src. Avail Pack Units is a calculated measure used to indicate the total quantity of pack units available at the source location. Tot. Dest. Avail (incl. Rpl. & Trsf. Out) Units Tot. Avail. Units This measure is the same as the one in the default profile. Refer to the measure, Tot. Avail. Units, in the Default Profile Measures.

**Tot. Avail. Dur (w)**

The Tot. Avail. Dur (w) is the same as the one in the default profile. Refer to the measure, Tot. Avail. Dur (w), in the Default Profile Measures.

**SKU-LOC Level (R & A) - Measures: Forecast Profile**

The Forecast measure profile available in the SKU-LOC Level (R & A) view contains the following measures.

**User Filter PROD - LOC**

The User Filter PROD - LOC is the same as the one in the default profile. Refer to the measure User Filter PROD-LOC in the Default Profile Measures.

**Fcst W+0 Units**

The Fcst W+0 Units is a calculated measure used to display forecast units for the current system date week for the product and location combination. The system date is available in the Today view.

**Fcst W+1 Units**

The Fcst W+1 Units is a calculated measure used to display forecast units at system date week +1 week for the product and location combination. The system date is available in the Today view.

**Fcst W+2 Units**

The Fcst W+2 Units is a calculated measure to display forecast units at system date week +2 weeks for the product and location combination. The system date is available in the Today view.

**Fcst W+3 Units**

The Fcst W+3 Units is a calculated measure used to display forecast units at system date week +3 weeks for the product and location combination. The system date is available in the Today view.

**Fcst W+0 to W+1 Units**

The Fcst W+0 to W+1 Units is a calculated measure used to display the accumulated forecast from the current system date week until the system current week + 1 for the product and location combination. The system date is available in the Today view.

**Fcst W+0 to W+2 Units**

The Fcst W+0 to W+2 Units is a calculated measure used to display the accumulated forecast from the current system date week until the system current week + 2 for the product and location combination. The system date is available in the Today view.

**Fcst W+0 to W+3 Units**

The Fcst W+0 to W+3 Units is a calculated measure used to display the accumulated forecast from the current system date week until the system current week + 3 for the product and location combination. The system date is available in the Today view.

**Forecast Over LT+RT Units**

The Forecast Over LT+RT Units is the same as the one in the default profile. Refer to the measure, Forecast Over LT+RT Units, in the Default Profile Measures.

**Final Fcst PL Wk Units**

The Final Fcst PL Wk Units measure is not applicable.

**Sell-Out Fcst (Wk) Units**

The Sell-Out Fcst (Wk) Units is an editable measure that is used to enter the demand at the location (destination location) for the product and location combination. In this view, the measure is aggregated and when changed the value is spread proportionally across weeks within the workspace (you can check the spread value in the SKU-LOC-WEEK Level (InvPlan) view).

**Sell-In Fcst (Wk) Units**

The Sell-In Fcst (Wk) Units is an editable measure to enter the weekly demand at the source location for the product and location combination.

**Tot. Demand (Wk) Units**

The Tot. Demand (Wk) Units is a calculated measure used to indicate the total weekly demand for the product and location combination. In this view, the measure is aggregated and when changed the value is spread proportionally across weeks within the workspace (you can check the spread value in the SKU- LOC-WEEK Level (InvPlan) view).

**Up To Sell\_Out Fcst Units**

The Up To Sell\_Out Fcst Units is a calculated measure used to indicate the sell-out Forecast from the source location perspective for the product and location combination.

**SKU-LOC Level (R & A) - Measures: Inventory Profile**

The Inventory measure profile available in the SKU-LOC Level (R & A) view contains the following measures.

**User Filter PROD - LOC**

The User Filter PROD - LOC is the same as the one in the default profile. Refer to the measure User Filter PROD-LOC in the Default Profile Measures.

**Tot. On Hand Units**

The Tot. On Hand Units is the same as the one in the availability profile. Refer to the measure, Tot. On Hand Units, in the Availability Profile Measures.

**Tot. Booked Units**

The Tot. Booked Units is a calculated measure used to indicate the total inventory booked in units for the product and location combination.

**In Transit over LT+RT Units**

The In Transit over LT+RT Units is the same as the one in the availability profile. Refer to the measure, Availability Profile Measures.

**Tot. In Transit Units**

The Tot. In Transit Units is a calculated measure used to indicate the total inventory units in transit for the product and location combination.

**Tot. In Transit**

The Tot. In Transit is a calculated measure used to display comments for the in-transit inventory and for the phase-out item's inventory, if any, for the product and location combination.

**Tot. On Order (in) Units**

The Tot. On Order (in) Units is a calculated measure used to indicate the total on-order inventory units for the product and location combination. The total on-order units include the on-order inventory loaded into IPOCS-Lifecycle Allocation and Replenishment plus the on-order inventory units for the replacement or phase-out product, if any.

**On Order (in) over LT+RT Units**

The On Order (in) over LT+RT Units is the same as the one in the availability profile. Refer to the measure, On Order (in) over LT+RT Units, in the Availability Profile Measures.

**In Transit + On Order (in) Units**

The In Transit + On Order (in) Units is a calculated measure used to indicate the accumulated on order and in-transit inventory units for the product and location combination.

**Tot. On Order (out) Units**

The Tot. On Order (out) Units is a calculated measure used to indicate the total on-order inventory units out from the source locations (for example, warehouse) for the product and location combination. The total on-order (out) units includes the on-order inventory loaded into IPOCS-Lifecycle Allocation and Replenishment plus the on-order (out) inventory units for the replacement/phase-out product, if any.

**On Order (out) over LT+RT Units**

The On Order (out) over LT+RT Units is the same as the one in the availability profile. Refer to the measure, On Order (out) over LT+RT Units, in the Availability Profile Measures.

**Tot. Cust. Order Units**

The Tot. Cust. Order Units is a calculated measure used to indicate the total customer order units for the product and location combination. The total customer orders include the customer orders loaded into IPOCS-Lifecycle Allocation and Replenishment plus the customer orders for the replacement or phase-out product, if any.

**Loc. On Hand Units**

The Loc. On Hand Units is a loaded measure used to indicate the on-hand inventory units for the product and location combination.

**Loc. Booked Units**

The Loc. Booked Units is a loaded measure used to indicate the booked or reserved inventory units for the product and location combination.

**Loc. In Transit Units**

The Loc. In Transit Units is a loaded measure used to indicate the in-transit inventory units for the product and location combination.

**Loc. In Transit**

The Loc. In Transit is a loaded measure used to indicate whether the product and location combination has in-transit inventory or not. When selected, there is in-transit inventory. When clear, there is no in-transit inventory.

**Loc. On Order (in) Units**

The Loc. On Order (in) Units is a loaded measure used to indicate the on-order inventory units (into the destination locations) for the product and location combination.

**Loc. On Order (out) Units**

The Loc. On Order (out) Units is a loaded measure used to indicate the on-order inventory units (out from source locations) for the product and location combination.

**Cust. Order Units**

The Cust. Order Units is a loaded measure used to indicate customer orders units for the product and location combination.

**Ph. Out On Hand Units**

The Ph. Out On Hand Units is a calculated measure used to indicate the product and location combination on-hand inventory units for the phased-out item, if any.

**Ph. Out Booked Units**

The Ph. Out Booked Units is a calculated measure used to indicate the product and location combination booked or reserved inventory units for the phased-out item, if any.

**Ph. Out In Transit Units**

The Ph. Out In Transit Units is a calculated measure used to indicate the product and location combination in-transit inventory units for the phased-out item, if any.

**Ph. Out In Transit**

The Ph. Out In Transit is a calculated measure used to indicate for product and location combination whether the phased-out item has in-transit inventory or not. When selected there is in-transit inventory. When clear, there is no in-transit inventory.

**Ph. Out On Order (in) Units**

The Ph. Out On Order (in) Units is a calculated measure used to indicate the product and location combination on-order inventory units (into the destination locations) for the phased-out item, if any.

**Ph. Out On Order (out) Units**

Ph. Out On Order (out) Units is a calculated measure used to indicate the product and location combination on-order inventory units (out from source locations) for the phased-out item, if any.

**Ph. Out Cust. Order Units**

The Ph. Out Cust. Order Units is a calculated measure used to indicate the product and location combination customer orders for the phased-out item, if any.

**Pack Type**

The Pack Type is a loaded measure used to indicate the product's pack type. Either simple or complex.

**Pack Desc.**

The Pack Desc. is a loaded measure used to indicate the product's pack description.

**Pack - SKU Ass. Count**

The Pack - SKU Ass. Count is a calculated measure used to indicate the total number of products (SKU) in the pack.

**Pack - SKU Ass. Units**

The Pack - SKU Ass. Units is an editable measure to indicate the total number of units the product (SKU) has in the pack.

**SKU-LOC Level (R & A) - Measures: Parameters Profile**

The Parameters measure profile available in the SKU-LOC Level (R & A) view contains the following measures.

**User Filter PROD - LOC**

The User Filter PROD - LOC is the same as the one in the default profile. Refer to the measure User Filter PROD-LOC in the Default Profile Measures.

**Asst. Prod-Loc**

The Asst. Prod-Loc is a loaded measure used to indicate whether the product and location combinations are assorted or not. For more details, refer to the same measure in the Product-Location view within the Manage Assortment workspace.

**Asst. Prod-Loc Count**

The Asst. Prod-Loc Count is a loaded measure used to indicate the total number of product and location combinations assorted. For more details, refer to the same measure in the Product-Location view within the Manage Assortment workspace.

**Asst. Prod-Loc Active**

The Asst. Prod-Loc Active is a loaded measure used to indicate whether the product and location combinations are assorted and still active or not. For more details check the same measure in the view Product- Location within the Manage Assortment workspace.

**Asst. Prod-Loc Active Count**

The Asst. Prod-Loc Active Count is a loaded measure used to indicate the total number of product and location combinations assorted and still active. For more details check the same measure in the view Product-Location within the Assortment Admin workspace.

**Asst. Prod-Loc Start Date**

The Asst. Prod-Loc Start Date is a loaded measure used to indicate the assortment start date for the assorted product and location combinations. For more details, refer to the same measure in the Product-Location view within the Manage Assortment workspace.

#### **Asst. Prod-Loc End Date**

The Asst. Prod-Loc End Date is a loaded measure used to indicate the assortment end date for the assorted product and location combinations. For more details, refer to the same measure in the Product-Location view within the Manage Assortment workspace.

#### **Lfc. Prod-Loc**

The Lfc. Prod-Loc is a loaded measure used to indicate whether the product and location combination has a valid lifecycle or not. For more details, refer to the same measure in the Product-Location view within the Manage Assortment workspace.

#### **Lfc Prod-Loc Count**

The Lfc Prod-Loc Count is a calculated measure used to indicate the number of locations where the product has a valid lifecycle. If this view is at the product and location level, then the count is not higher than one at the view's lowest level.

#### **PL Lfc.**

The PL Lfc. is a loaded measure used to indicate whether the product and location combination has a valid lifecycle or not at the system date.

#### **Lfc. Active @ Today**

The Lfc. Active @ Today is a loaded measure used to indicate whether the product and location combination has a valid lifecycle or not at the system date.

#### **Display Qty Units**

The Display Quantity Units is a loaded measure used to indicate the Display Quantity for the product and location combination used by IPOCS-Lifecycle Allocation and Replenishment for the RUTL calculation.

#### **Min Order Qty Units**

The Min Order Quantity Units is an editable measure used to indicate the minimum order quantity for the product and location combination.

#### **Mult. Order Qty Units**

The Mult. Order Quantity Units is an editable measure used to indicate the number of multiple order quantities for the product and location combination.

#### **Fixed TS 1 Units**

The Fixed TS 1 Units is a loaded measure used to indicate the initial allocation for the product and location combination. For more details, refer to the same measure in the Product-Location view within the Manage Assortment workspace.

#### **Fixed TS 2 Units**

The Fixed TS 2 Units is an editable measure used to indicate an initial allocation for the product and location combination. For more details, refer to the same measure in the Product-Location view within the Manage Assortment workspace.

#### **Fixed TS 3 Units**

The Fixed TS 3 Units is an editable measure used to indicate an initial allocation for the product and location combination. For more details, refer to the same measure in the Product-Location view within the Manage Assortment workspace.

**Tot. Init. Fcst Units**

The Tot. Init. Fcst Units is a loaded measure to display the total initial forecast for the product and location combination. For more details check the same measure in the SKU-LOC view within the Supply Chain Network workspace.

**Conversion UOM 1**

The Conversion UOM 1 is an editable measure used to indicate a value when converting units into a specific unit of measure based on the Constraint UOM 1 for scaling.

**Conversion UOM 2**

The Conversion UOM 2 is an editable measure used to indicate a value when converting units into a specific unit of measure based on the Constraint UOM 1 for scaling.

**Conversion UOM 3**

The Conversion UOM 3 is an editable measure used to indicate a value when converting units into a specific unit of measure based on the Constraint UOM 1 for scaling.

**Avg. Cost €**

The Avg. Cost € is an editable measure used to indicate the average cost for the product and location combination.

**Price (excl.VAT) €**

The Price (excl.VAT) € is an editable measure used to indicate the price excluding VAT for the product and location combination.

**PL BOD**

The PL BOD is a loaded measure used to indicate the bill of distribution applied to the product and location combination. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Primary Source @ Today**

The Primary Source @ Today is a loaded measure used to indicate the applied primary source for the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Reserved Source 1 @ Today**

The Reserved Source 1 @ Today is a calculated measure used to indicate the applied reserved source 1 for the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Reserved Source 2 @ Today**

The Reserved Source 2 @ Today is a calculated measure used to indicate the applied reserved source 2 for the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Alternate Source @ Today**



The Alternate Source @ Today is a calculated measure used to indicate the applied alternative source for the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**LLC @ Today**

The LLC @ Today is a calculated measure used to indicate the low-level code applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Lead Time @ Today Dur (d)**

vLead Time @ Today Dur (d) is a calculated measure used to indicate the applied lead time, in days, for the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**PL Plc.**

The PL Plc. is a loaded measure used to indicate the planning calendar applied to the product and location combination. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Revw @ Today**

The Revw @ Today is a calculated measure used to indicate if Today (current system date) is a review day for the product and location combination. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Next Revw @ Today Date**

The Next Revw @ Today Date is a calculated measure used to indicate the next review date for the product and location combination. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Next Revw @ Today Dur (d)**

The Next Revw @ Today Dur (d) is a calculated measure used to indicate the number of days to the next review date for the product and location combination and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Avg Revw Time @ Today Dur (d)**

The Avg Revw Time @ Today Dur (d) is a calculated measure used to indicate the average number of days between each review period (planning period) for the product and location combination. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**RUTL Mask**

The RUTL Mask is the same as the one in the availability profile. Refer to the measure, RUTL Mask, in the Availability Profile Measures.

**PL Rpl.**

The PL Rpl. is a loaded measure used to indicate the replenishment parameter applied to the product and location combination. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Replenishment Parameters workspace.

**Min Cred. Qty @ Today Units**

The Min Cred. Quantity @ Today Units is a calculated measure used to indicate the Minimum Credible Quantity applied to the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**ROL Meth. @ Today**

The ROL Meth. @ Today is a calculated measure used to indicate the ROL method applied to the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Min Qty @ Today Units**

The Min Quantity @ Today Units is a calculated measure used to indicate the ROL minimum quantity units applied to the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Min TS @ Today Dur (d)**

The Min TS @ Today Dur (d) is a calculated measure used to indicate the ROL minimum time supply (in days) applied to the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Tgt. SL @ Today %**

The Tgt. SL @ Today % is a calculated measure used to indicate the Target Service Level % applied to the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Volatility @ Today %**

The Volatility @ Today % is a calculated measure used to indicate the Volatility % applied to the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**ROL Sft. Time @ Today Dur (d)**

The ROL Sft. Time @ Today Dur (d) details the Reorder level safety time duration applicable today based on rules association and used in replenishment calculations where the RUTL method is not Target Stock. The ROL level is determined as lead time + review time + ROL Sft Time @ Today Dur (d).

**RUTL Meth. @ Today**

The RUTL Meth. @ Today is a calculated measure used to indicate the RUTL method applied to the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Max Qty @ Today Units**

The Max Quantity @ Today Units is a calculated measure used to indicate the RUTL maximum quantity units applied to the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Max TS @ Today Dur (d)**

The Max TS @ Today Dur (d) is a calculated measure used to indicate the RUTL maximum time supply (in days) applied to the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Tgt. DoS @ Today Dur (d)**

The Tgt. DoS @ Today Dur (d) is a calculated measure used to indicate the Target Days of Supply (in days) applied to the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**TS Meth. @ Today**

The TS Meth. @ Today is a calculated measure used to indicate the target stock method applied to the product and location combination at the system date (when the RUTL method is target stock) and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**TS Seas. Fcst @ Today %**

The TS Seas. Fcst @ Today % is a calculated measure used to indicate the percentage of the Seasonal Forecast applied to the product and location combination at the system date (to be used when the RUTL method is target stock) and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**TS Sft. Time @ Today Dur (d)**

The TS Sft. Time @ Today Dur (d) is a calculated measure used to indicate the number of days for the stock safety applied to the product and location combination at the system date (to be used when the RUTL method is target stock) and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Order Rounding Threshold @ Today %**

The Order Rounding Threshold @ Today % is a calculated measure used to indicate the percentage to round up the orders applied to the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**PL Change**

The PL Change is a loaded measure used to indicate the change parameter applied to the product and location combination. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Replenishment Parameters workspace.

**Repl. Status @ Today**

The Repl. Status @ Today is a calculated measure used to indicate whether the product and location combination at the system date is replenishable or not and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**ROL Chng @ Today %**

The ROL Chng @ Today % is a calculated measure used to indicate the percentage to increase or decrease the system-generated ROL value applied to the product and location combination at the system date and can be overridden. For more details about the measure,

refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

#### **RUTL Chng @ Today %**

The RUTL Chng @ Today % is a calculated measure used to indicate the percentage to increase or decrease the system-generated RUTL value applied to the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

#### **Rpl. Dest. Mask**

The Rpl. Dest. Mask is the same as the one in the availability profile. Refer to the measure, Rpl. Dest. Mask, in the Availability Profile Measures.

#### **Rpl. Src. Mask**

The Rpl. Src. Mask is the same as the one in the availability profile. Refer to the measure, Rpl. Dest. Mask, in the Availability Profile Measures.

#### **PL Cst.**

The PL Cst. is a loaded measure used to indicate the constraint parameter applied to the product and location combination. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Replenishment Parameters workspace.

#### **Avail. Constr. (Src) @ Today**

The Avail. Constr. (Src) @ Today is a calculated measure used to indicate whether a constraint is enabled or disabled (at the source location) for the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

#### **Src. Avail. (Src) @ Today**

The Src. Avail. (Src) @ Today is a calculated measure used to indicate which stock units to be used from the source locations are applied to the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

#### **Src. Avail. (Src) @ Today Dur (d)**

The Src. Avail. (Src) @ Today Dur (d) is a calculated measure used to indicate the number of days to get the in-transit and on-order stock is applied to the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

#### **Rpl. Active (Dst) @ Today**

The Rpl. Active (Dst) @ Today is a calculated measure used to indicate the product and location combination at the system date if the location has the replenishment active or not and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

#### **Fulfill Till Layer (Dst) @ Today**

The Fulfill Till Layer (Dst) @ Today is a calculated measure used to indicate the layer applied to the product and location combination at the system date (layer until which IPOCS-Lifecycle Allocation and Replenishment should fulfill the demand) and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Ration. Prio (Dst) @ Today**

Ration. Prio (Dst) @ Today is a calculated measure used to indicate the rationing priority applied to the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**SubLayer (Dst) @ Today**

The SubLayer (Dst) @ Today is a calculated measure used to indicate the sublayers applied to the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Assign Pack (Dst) @ Today**

The Assign Pack (Dst) @ Today is a calculated measure used to indicate the pack types' assignment applied to the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Min Pack Fill Rate 1 (Dst) @ Today %**

The Min Pack Fill Rate 1 (Dst) @ Today % is a calculated measure used to indicate the minimum pack fill rate percentage for first round of complex pack assignment applied to the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Min Pack Fill Rate 2 (Dst) @ Today %**

The Min Pack Fill Rate 2 (Dst) @ Today % is a calculated measure used to indicate the minimum pack fill rate percentage for second round of complex pack assignment applied to the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**SKU-LOC Level (R & A) - Measures: Plan Profile**

The Plan measure profile available in the SKU-LOC Level (R & A) view contains the following measures.

**User Filter PROD - LOC**

The User Filter PROD - LOC is the same as the one in the default profile. Refer to the measure User Filter PROD-LOC in the Default Profile Measures.

**RUTL Mask**

The RUTL Mask is the same as the one in the availability profile. Refer to the measure, RUTL Mask, in the Availability Profile Measures.

**Rpl. Dest. Mask**

The Rpl. Dest. Mask is the same as the one in the availability profile. Refer to the measure, Rpl. Dest. Mask, in the Availability Profile Measures.

**Rpl. Src. Mask**

The Rpl. Src. Mask is the same as the one in the availability profile. Refer to the measure, Rpl. Dest. Mask, in the Availability Profile Measures.

### **Pack Partition**

The Pack Partition is the same as the one in the Plan profile for the view SKU Level (R & A) but available at the product and location level. Refer to the measure, Pack Partition, in the view SKU Level (R & A) Measures: Plan Profile in the Default Profile Measures.

### **Tot. Physical Avail. Units**

The Tot. Physical Avail. Units is the same as the one in the availability profile. Refer to the measure, Tot. Physical Avail. Units, in the Availability Profile Measures.

### **Tot. Physical Avail. Dur (w)**

The Tot. Physical Avail. Dur (w) is the same as the one in the availability profile. Refer to the measure, Tot. Physical Avail. Dur (w), in the Availability Profile Measures.

### **Tot. Dest. Avail. Units**

The Tot. Dest. Avail. Units is the same as the one in the default profile. Refer to the measure, Tot. Dest. Avail. Units, in the Default Profile Measures.

### **Tot. Dest. Avail. Dur (w)**

The Tot. Dest. Avail. Dur (w) is a calculated measure used to indicate the number of weeks that the Tot. Dest. Avail. Units can cover the demand for the product and location combination.

### **Tot. Src. Avail. Units**

The Tot. Src. Avail. Units is a calculated measure used to indicate the total quantity of units available at the source location for the product and location combination. In this view, the value is the total for the product.

### **Tot. Src. Avail. Pack Units**

The Tot. Src. Avail. Pack Units is a calculated measure used to indicate the total quantity of pack units available at the source location for the product and location combination. In this view, the value is the total for the product.

### **User Tot. Src. Avail. Units**

The User Tot. Src. Avail. Units is an editable measure user can use to enter the total quantity of units available at the source location for the product. The value of this measure overrides the measure Tot. Src. Avail. Unit.

### **Manual Push Units**

The Manual Push Units is an editable measure used to enter the total quantity of units to be manually pushed from the source location to the destination locations for the product. The value is spread proportionally between all the product's destination locations.

### **ROL @ Today Units**

The ROL @ Today Units is a calculated measure used to indicate the Reorder level (ROL) value in units for the product and location combination at the system date.

### **RUTL @ Today Units**

The RUTL @ Today Units is the same as the one in the default profile. Refer to the measure, RUTL @ Today Units, in the Default Profile Measures.

### **User RUTL Override Units**

The User RUTL Override Units is an editable measure used to enter the Reorder Up-to Level (RUTL) value in units for the product and location combination. The value of this measure overrides the measure RUTL @ Today Units.

**User RUTL Override End Date**

The User RUTL Override End Date is an editable measure used to enter the date when IPOCS-Lifecycle Allocation and Replenishment should stop using the user-defined RUTL units (measure User RUTL Override Units) and start using the system calculated RUTL units (measure RUTL @ Today Units).

**Forecast Over LT+RT Units**

The Forecast Over LT+RT Units is the same as the one in the forecast profile. Refer to the measure, Forecast Over LT+RT Units, in the Forecast Profile Measures.

**Unc. Need Total Units**

The Unc. Need Total Units is the same as the one in the default profile. Refer to the measure, Unc. Need Total Units, in the Default Profile Measures.

**Min Unc. Need Pack Units**

The Min Unc. Need Pack Units indicates the minimum unit of Packs needed regardless of Pack Fill Rate.

**Max Unc. Need Pack Units**

The Max Unc. Need Pack Units indicates the maximum unit of Packs needed regardless of Pack Fill Rate.

**User Rpl. Fix Locked Units**

The User Rpl. Fix Locked Units is an editable measure you can use to enter fixed replenishment units (order quantity) for the product and location combination. This measure overrides the product's system-calculated replenishment units.

**Sys. Rpl. Plan In Units**

The Sys. Rpl. Plan In Units is the same as the one in the default profile. Refer to the measure, Sys. Rpl. Plan In Units, in the Default Profile Measures.

**Sys. Rpl. Plan In Pack Units**

The Sys. Rpl. Plan In Pack Units is the same as the one in the default profile. Refer to the measure, Sys. Rpl. Plan In Pack Units, in the Default Profile Measures.

**Unc. Req. Total Units**

The Unc. Req. Total Units is a calculated measure used to indicate the total unconstrained quantity, in units, needed for the source location (for example, warehouse) for the product.

**Sys. Rpl. Plan Out Units**

The Sys. Rpl. Plan Out Units is the same as the one in the availability profile. Refer to the measure, Sys. Rpl. Plan Out Units, in the Availability Profile Measures.

**Sys. Rpl. Plan Out Pack Units**

The Sys. Rpl. Plan Out Pack Units is a calculated measure used to indicate the pack order quantity (either simple or complex packs) for the source location based on the source location needs. This value is calculated based on the replenishment rules and the source location demand.

### **Tot. Avail. Units**

The Tot. Avail. Units is the same as the one in the default profile. Refer to the measure, Tot. Avail. Units, in the Default Profile Measures.

### **Tot. Avail. Dur (w)**

The Tot. Avail. Dur (w) is the same as the one in the default profile. Refer to the measure, Tot. Avail. Dur (w), in the Default Profile Measures.

### **Tot. Regular Units**

The Tot. Regular Units is the same as the one in the default profile. Refer to the measure, Tot. Regular Units, in the Default Profile Measures.

### **Tot. Deficit Units**

The Tot. Deficit Units is the same as the one in the default profile. Refer to the measure, Tot. Deficit Units, in the Default Profile Measures.

### **Tot. Deficit %**

The Tot. Deficit % is the same as the one in the default profile. Refer to the measure, Tot. Deficit %, in the Default Profile Measures.

### **Tot. Surplus Units**

The Tot. Surplus Units is the same as the one in the default profile. Refer to the measure, Tot. Surplus Units, in the Default Profile Measures.

### **Tot. Surplus %**

The Tot. Surplus % is the same as the one in the default profile. Refer to the measure, Tot. Surplus %, in the Default Profile Measures.

### **Tot. Fulfil. %**

The Tot. Fulfil. % is the same as the one in the default profile. Refer to the measure, Tot. Fulfil. %, in the Default Profile Measures.

### **Rpl. TBA**

The Rpl. TBA is the same as the one in the default profile. Refer to the measure, Rpl. TBA, in the Default Profile Measures.

### **Appr. Rpl. Plan**

The Appr. Rpl. Plan is an editable measure used to indicate whether the product and location order should be approved or not by the approval process. The **Replenishment Approval** action button approves all orders when this measure is selected.

### **Appr. Rpl. Plan User ID**

The Appr. Rpl. Plan User ID is a calculated measure used to audit the **Replenishment Approval** action button. It is populated with the user-identifier that last ran the Replenishment Approval.

### **Appr. Rpl. Plan Date**

The Appr. Rpl. Plan Date is a calculated measure to audit the **Replenishment Approval** action button. It is populated with the date and time that the replenishment approval was last run.

### **Appr. Rpl. Plan In Units**



The Appr. Rpl. Plan In Units is the same as the one in the default profile. Refer to the measure, Appr. Rpl. Plan In Units, in the Default Profile Measures.

**Appr. Rpl. Plan In Pack Units**

The Appr. Rpl. Plan In Pack Units is the same as the one in the availability profile. Refer to the measure, Appr. Rpl. Plan In Pack Units, in the Availability Profile Measures.

**Appr. Rpl. Plan Out Units**

The Appr. Rpl. Plan Out Units is the same as the one in the availability profile. Refer to the measure, Appr. Rpl. Plan Out Units, in the Availability Profile Measures.

**Exp. Rpl. Plan Date**

The Exp. Rpl. Plan Date is a calculated measure to audit the replenishment export for the product and location combination. It is populated with the date and time that the replenishment was exported by the batch, if exported by the last batch run. Otherwise, it is empty.

**Exp. Rpl. Plan In Units**

The Exp. Rpl. Plan In Units is the same as the one in the availability profile. Refer to the measure, Exp. Rpl. Plan In Units, in the Availability Profile Measures.

**Exp. Rpl. Plan In (details)**

The Exp. Rpl. Plan In (details) is a calculated measure used to indicate the breakdown of exported plan in units per batch cycle.

**Exp. Rpl. Plan Out Units**

The Exp. Rpl. Plan Out Units is the same as the one in the availability profile. Refer to the measure, Exp. Rpl. Plan Out Units, in the Availability Profile Measures.

**Exp. Rpl. Plan Out (details)**

The Exp. Rpl. Plan Out (details) is a calculated measure used to indicate the breakdown of exported plan out units per batch cycle.

**Note:**

When the view has a lower intersection than the displayed measure, then the measure displays "-" to inform you that the measure is not available at that level.

**SKU-LOC Level (R & A) - Measures: Replacement Profile**

The Replacement measure profile available in the SKU-LOC Level (R & A) view contains the following measures.

**User Filter PROD - LOC**

The User Filter PROD - LOC is the same as the one in the default profile. Refer to the measure User Filter PROD-LOC in the Default Profile Measures.

**Phs. Out PROD**

vPhs. Out PROD is an editable measure used to select the phase-out product for the current product. You can select the product from a picklist populated with all available products within the workspace. It is not possible to have different values per location.

**Phs. Out Subst. Date**

The Phs. Out Subst. Date is an editable measure used to select the substitution date for the phased out product. It is not possible to have different values per location.

**Tot. On Hand Units**

The Tot. On Hand Units is the same as the one in the inventory profile. Refer to the measure, Tot. On Hand Units, in the Inventory Profile Measures.

**Tot. Booked Units**

The Tot. Booked Units is the same as the one in the inventory profile. Refer to the measure, Tot. Booked Units, in the Inventory Profile Measures.

**Tot. In Transit Units**

The Tot. In Transit Units is the same as the one in the inventory profile. Refer to the measure, Tot. In Transit Units, in the Inventory Profile Measures.

**Tot. In Transit**

The Tot. In Transit is the same as the one in the inventory profile. Refer to the measure, Tot. In Transit, in the Inventory Profile Measures.

**Tot. On Order (in) Units**

The Tot. On Order (in) Units is the same as the one in the inventory profile. Refer to the measure, Tot. On Order (in) Units, in the Inventory Profile Measures.

**Tot. On Order (out) Units**

The Tot. On Order (out) Units is the same as the one in the inventory profile. Refer to the measure, Tot. On Order (out) Units, in the Inventory Profile Measures.

**Tot. Cust. Order Units**

The Tot. Cust. Order Units is the same as the one in the inventory profile. Refer to the measure, Tot. Cust. Order Units, in the Inventory Profile Measures.

**Loc. On Hand Units**

The Loc. On Hand Units is the same as the one in the inventory profile. Refer to the measure, Loc. On Hand Units, in the Inventory Profile Measures.

**Loc. Booked Units**

The Loc. Booked Units is the same as the one in the inventory profile. Refer to the measure, Loc. Booked Units, in the Inventory Profile Measures.

**Loc. In Transit Units**

The Loc. In Transit Units is the same as the one in the inventory profile. Refer to the measure, Loc. In Transit Units, in the Inventory Profile Measures.

**Loc. In Transit**

The Loc. In Transit is the same as the one in the inventory profile. Refer to the measure, Loc. In Transit, in the Inventory Profile Measures.

**Loc. On Order (in) Units**

The Loc. On Order (in) Units is the same as the one in the inventory profile. Refer to the measure, Loc. On Order (in) Units, in the Inventory Profile Measures.

**Loc. On Order (out) Units**

The Loc. On Order (out) Units is the same as the one in the inventory profile. Refer to the measure, Loc. On Order (out) Units, in the Inventory Profile Measures.

**Cust. Order Units**

The Cust. Order Units is the same as the one in the inventory profile. Refer to the measure, Cust. Order Units, in the Inventory Profile Measures.

**Ph. Out On Hand Units**

The Ph. Out On Hand Units is the same as the one in the inventory profile. Refer to the measure, Ph. Out On Hand Units, in the Inventory Profile Measures.

**Ph. Out Booked Units**

The Ph. Out Booked Units is the same as the one in the inventory profile. Refer to the measure, Ph. Out Booked Units, in the Inventory Profile Measures.

**Ph. Out In Transit Units**

The Ph. Out In Transit Units is the same as the one in the inventory profile. Refer to the measure, Ph. Out In Transit Units, in the Inventory Profile Measures.

**Ph. Out In Transit**

The Ph. Out In Transit is the same as the one in the inventory profile. Refer to the measure, Ph. Out In Transit, in the Inventory Profile Measures.

**Ph. Out On Order (in) Units**

The Ph. Out On Order (in) Units is the same as the one in the inventory profile. Refer to the measure, Ph. Out On Order (in) Units, in the Inventory Profile Measures.

**Ph. Out On Order (out) Units**

The Ph. Out On Order (out) Units is the same as the one in the inventory profile. Refer to the measure, Ph. Out On Order (out) Units, in the Inventory Profile Measures.

**Ph. Out Cust. Order Units**

The Ph. Out Cust. Order Units is the same as the one in the inventory profile. Refer to the measure, Ph. Out Cust. Order Units, in the Inventory Profile Measures.

 **Note:**

When the view has a lower intersection than the displayed measure, then the measure displays "-" to inform you that the measure is not available at that level.

**SKU-LOC Level (R & A) - Measures: YTDYTG Profile**

The Year-To-Date Year-To-Go (YTDYTG) measure profile available in the SKU-LOC Level (R & A) view contains the following measures.

**User Filter PROD - LOC**

The User Filter PROD - LOC is the same as the one in the default profile. Refer to the measure User Filter PROD-LOC in the Default Profile Measures.

**Tot. Init. Fcst Units**

The Tot. Init. Fcst Units is the same as the one in the parameters profile. Refer to the measure, Tot. Init. Fcst Units, in the Parameters Profile Measures.

**Actual Loc. Sales Units**

The Actual Loc. Sales Units is the same as the one in the actuals profile. Refer to the measure, Actual Loc. Sales Units, in the Actuals Profile Measures.

**Sell-Out Fcst (Wk) Units**

The Sell-Out Fcst (Wk) Units is the same as the one in the forecast profile. Refer to the measure, Sell-Out Fcst (Wk) Units, in the Forecast Profile Measures.

**Lifecycle Sales To-Date %**

The Lifecycle Sales To-Date % is the same as the one in the default profile. Refer to the measure, Lifecycle Sales To-Date %, in the Default Profile Measures.

**Lifecycle Sales To-Go %**

The Lifecycle Sales To-Go % is the same as the one in the default profile. Refer to the measure, Lifecycle Sales To-Go %, in the Default Profile Measures.

**Actual Loc. Recpt Units**

The Actual Loc. Recpt Units is the same as the one in the actuals profile. Refer to the measure, Actual Loc. Recpt Units, in the Actuals Profile Measures.

**Actual Loc. Shipmt Units**

The Actual Loc. Shipmt Units is the same as the one in the actuals profile. Refer to the measure, Actual Loc. Shipmt Units, in the Actuals Profile Measures.

**Lifecycle Receipt To-Date %**

The Lifecycle Receipt To-Date % is a calculated measure used to indicate the percentage of actual receipts up to date against the total initial forecast for the product and location combination.

**Figure 21-34 Calculation**

$$100 * \frac{\sum_{\text{firstweek}}^{\text{currentweek}} \text{ActualLoc. RecptUnits}}{\text{Tot. Init. FcstUnits}}$$

**Lifecycle Sell-Thru %**

The Lifecycle Sell-Thru % is a calculated measure used to indicate the percentage of lifecycle product's sell-through for the product and location combination.

**Figure 21-35 Calculation**

$$100 * \frac{\sum_{\text{firstweek}}^{\text{currentweek}} \text{ActualSalesUnits}}{\sum_{\text{firstweek}}^{\text{currentweek}} \text{ActualLoc. RecptUnits}}$$

## SKU-Source LOC Level (R & A) View

The **SKU-Source LOC Level (R & A) View**, under the **By Prod** tab, allows you to review the replenishment and allocation calculated values at the product level from the source location perspective.

**Figure 21-36 SKU-Source LOC Level (R & A) View**

Measure (Default)	Value	Unit
PROD - LOC Alerts	Void	
Src. Avail. (Src) @ Today	OH	
Src. Avail. (Src) @ Today Dur (d)	d	
Tot. On Hand Units		373
In Transit + On Order (in) Units		373
Tot. Src. Avail. Units		373
Tot. Src. Avail. Pack Units		373
User Tot. Src. Avail. Units		373
Manual Push Units		1520
Unc. Req. Total Units		1520
Sys. Rpl. Plan Out Units	298	373
Sys. Rpl. Plan Out Pack Units		373
Appr. Rpl. Plan Out Units		373
Tot. Avail. Units		298
Tot. Avail. Dur (w)	w	6.3 w

### SKU-Source LOC Level (R & A) View - Default Profile Measures

The Default measure profile available in the SKU-Source LOC Level (R & A) view contains the following measures.

#### PROD - LOC Alerts

The PROD - LOC Alerts is a calculated measure used to display the Alert Short Descr. of all the alerts that got triggered for the product and location combination.

#### Src. Avail. (Src) @ Today

The Src. Avail. (Src) @ Today is a calculated measure used to indicate which stock units to be used from the source locations are applied to the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

#### Src. Avail. (Src) @ Today Dur (d)

The Src. Avail. (Src) @ Today Dur (d) is a calculated measure used to indicate the number of days to get the in-transit and on-order stock is applied to the product and location combination

at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

**Tot. On Hand Units**

The Tot. On Hand Units is a calculated measure used to indicate the total on-hand inventory units for the product and location combination. The total on-hand units includes the on-hand inventory loaded into IPOCS-Lifecycle Allocation and Replenishment plus the on-hand inventory units for the replacement/phase-out product, if any.

**In Transit + On Order (in) Units**

The In Transit + On Order (in) Units is a calculated measure used to indicate the accumulated on-order and in-transit inventory units for the product and location combination.

**Tot. Src. Avail. Units**

The Tot. Src. Avail. Units is a calculated measure used to indicate the total quantity of units available at the source location for the product. (This considers the inventory buckets defined by the Src. Avail. (Src) @ Today measure).

**Tot. Src. Avail. Pack Units**

The Tot. Src. Avail. Pack Units is a calculated measure used to indicate the total quantity of pack units available at the source location.

**User Tot. Src. Avail. Units**

The User Tot. Src. Avail. Units is an editable measure you can use to enter the total quantity of units available at the source location for the product. The value of this measure overrides the measure Tot. Src. Avail. Unit

**Manual Push Units**

The Manual Push Units is an editable measure used to input the total quantity of units to be manually pushed from the source location to the destination locations for the product. The value is spread proportionally between all the product's destination locations.

**Unc. Req. Total Units**

The Unc. Req. Total Units is a calculated measure used to indicate the total unconstrained quantity, in units, needed for the source location (for example, warehouse) for the product.

**Sys. Rpl. Plan Out Units**

The Sys. Rpl. Plan Out Units is a calculated measure used to indicate the order quantity for the source location based on the source location needs. This value is calculated based on the replenishment rules and the source location demand.

**Sys. Rpl. Plan Out Pack Units**

The Sys. Rpl. Plan Out Pack Units is a calculated measure used to indicate the pack order quantity (either simple or complex packs) for the source location based on the source location needs. This value is calculated based on the replenishment rules and the source location demand.

**Appr. Rpl. Plan Out Units**

The Appr. Rpl. Plan Out Units is a calculated measure used to indicate the source location approved replenishment units for the product and location combination.

**Tot. Avail. Units**

The Tot. Avail. Units is a calculated measure used to indicate the total quantity of units available for the product and location combination considering all inventory (booked, on-hand, transit and on-order) plus all orders (approved, planned and exported) plus all transfers (approved, planned and exported).

**Tot. Avail. Dur (w)**

The Tot. Avail. Dur (w) is a calculated measure used to indicate the number of weeks that the Tot. Avail. Units can cover the demand for the product and location combination.

## VAR-LOC Level (R & A) View

The **VAR-LOC Level (R & A) View**, under the **By Prod** tab, is similar to the view SKU-LOC Level (R & A) but allows you to review the variant and location levels.

The navigation of this view is very conveniently driven by real-time alerts or workspace alerts. To leverage the real-time alert navigation in this workspace the desired alerts should be enabled as RTA (measure Enable RTA) in the To-Do List view.

**Figure 21-37 VAR-LOC Level (R & A) View**

Location	MaxStk	MinDsp	Tot. Dest. Avail.	Tot. Dest. Avail. Dur	Forecast Over LT+RT	RJTL @ Today Units	Unc. Ne	Rpt. Plan In	Sys. Rpt. Plan In Pack
1000 Web				w	15.94	475		115	
1005 Philadelphia Outlet				w	7.45	271		65	
1074 Pittsburgh Outlet				w	14.84	259		63	
1075 Newark Outlet				w	19.87	259		63	
1076 Baltimore				w	19.95	286		68	
1077 Richmond				w	7.33	309	309	74	
1078 Washington D.C.				w	11.24	273	273	66	
1084 Norfolk				w	14.63	284	284	69	
1085 Virginia Beach				w	19.73	270	270	65	
1113 Raleigh				w	11.21	284	284	69	
1164 New Castle				w	11.07	283	283	68	
1172 Allegheny				w	19.82	271	271	65	
1173 Asheville				w	7.39	284	284	68	
1184 Wilmington				w	11.18	271	271	65	
1185 Greensboro				w	14.79	284	284	68	

### VAR-LOC Level (R & A) View - Default Profile Measures

The Default measure profile available in this view contains the same measures as the Default measure profile in the SKU-LOC Level (R & A) view. The only difference is that in this view, the data is aggregated from SKU to the VARIANT level. For more information regarding the measures in this profile, refer to the Measures: Default Profile under the SKU-LOC Level (R & A) view.

### VAR-LOC Level (R & A) - Measures: Actuals Profile

The Actuals measure profile available in this view contains the same measures as the Actuals measure profile in the SKU-LOC Level (R & A) view. The only difference is that In this view, the data is aggregated from SKU to the VARIANT level. For more information regarding the measures in this profile refer to the Measures: Actuals Profile under the SKU-LOC Level (R & A) view.

**VAR-LOC Level (R & A) - Measures: Availability Profile**

The Availability measure profile available in this view contains the same measures as the Availability measure profile in the SKU-LOC Level (R & A) view. The only difference is that In this view, the data is aggregated from SKU to the VARIANT level. For more information regarding the measures in this profile refer to the Measures: Availability Profile under the SKU-LOC Level (R & A) view.

**VAR-LOC Level (R & A) - Measures: Forecast Profile**

The Forecast measure profile available in this view contains the same measures as the Forecast measure profile in the SKU-LOC Level (R & A) view. The only difference is that In this view, the data is aggregated from SKU to the VARIANT level. For more information regarding the measures in this profile refer to the Measures: Forecast Profile under the SKU-LOC Level (R & A) view.

**VAR-LOC Level (R & A) - Measures: Inventory Profile**

The Inventory measure profile available in this view contains the same measures as the Inventory measure profile in the SKU-LOC Level (R & A) view. The only difference is that in this view the data is aggregated from SKU to the VARIANT level. For more information regarding the measures in this profile refer to the Measures: Inventory Profile under the SKU-LOC Level (R & A) view.

**VAR-LOC Level (R & A) - Measures: Parameters Profile**

The Parameters measure profile available in this view contains the all the measures as in the Parameters measure profile in the SKU-LOC Level (R & A) view plus some additional variant measures. The only difference is that in this view the data is aggregated from SKU to the VARIANT level. For more information regarding the measures in this profile refer to the Measures: Parameters Profile under the SKU-LOC Level (R & A) view.

Following are the additional measures in this profile.

**Asst. Var-Loc**

The Asst. Var-Loc is a loaded measure used to indicate whether the variant and location combinations are assorted or not. For more details check the same measure in the view Variant-Location within the Manage Assortment workspace.

**Asst. Var-Loc Count**

The Asst. Var-Loc Count is a loaded measure used to indicate the total number of variant and location combinations assorted.

**Asst. Var-Loc Active**

The Asst. Var-Loc Active is a loaded measure used to indicate whether the variant and location combinations are assorted and still active or not. For more details check the same measure in the view Variant- Location within the Manage Assortment workspace.

**Asst. Var-Loc Active Count**

The Asst. Var-Loc Active Count is a loaded measure used to indicate the total number of variant and location combinations assorted and still active.

**Asst. Var-Loc Start Date**



The Asst. Var-Loc Start Date is a loaded measure used to indicate the assortment start date for the assorted variant and location combinations. For more details check the same measure in the view Variant-Location within the Manage Assortment workspace.

#### **Asst. Var-Loc End Date**

The Asst. Var-Loc End Date is a loaded measure used to indicate the assortment end date for the assorted variant and location combinations. For more details check the same measure in the view Variant-Location within the Manage Assortment workspace.

#### **Asst. Var-Loc From Start Dur (weeks)**

The Asst. Var-Loc From Start Dur (weeks) is a calculated measure used to indicate the number of elapsed weeks since the assortment started date indicated in the measure Asst. Var-Loc Start Date. The number the weeks is calculated until IPOCS-Lifecycle Allocation and Replenishment today's week.

#### **VAR-LOC Level (R & A) - Measures: Plan Profile**

The Plan measure profile available in this view contains the same measures as the Plan measure profile in the SKU-LOC Level (R & A) view. The only difference is that in this view the data is aggregated from SKU to the VARIANT level. For more information regarding the measures in this profile refer to the Measures: Plan Profile under the SKU-LOC Level (R & A) view.

#### **VAR-LOC Level (R & A) - Measures: Replacement Profile**

The Replacement measure profile available in this view contains the same measures as the Replacement measure profile in the SKU-LOC Level (R & A) view. The only difference is that in this view the data is aggregated from SKU to the VARIANT level. For more information regarding the measures in this profile refer to the Measures: Replacement Profile under the SKU-LOC Level (R & A) view.

#### **VAR-LOC Level (R & A) - Measures: YTDYTG Profile**

The YTDYTG measure profile available in this view contains the same measures as the YTDYTG measure profile in the SKU-LOC Level (R & A) view. The only difference is that in this view the data is aggregated from SKU to the VARIANT level. For more information regarding the measures in this profile refer to the Measures: YTDYTG Profile under the SKU-LOC Level (R & A) view.

## VAR-Source LOC Level (R & A) View

The **VAR-Source LOC Level (R & A) View**, under the **By Prod tab**, is similar to the view SKU-Source LOC Level (R & A) but allows you to perform the review at the variant level rather than SKU. For more details regarding the measures, refer to the SKU-Source LOC Level (R & A) view.

Figure 21-38 VAR-Source LOC Level (R & A) View

Metric	Value
PROD - LOC Alerts	Newitm ShtageCurr
Src. Avail. (Src @ Today	OH
Src. Avail. (Src @ Today Dur (d)	d
Tot. On Hand Units	1,119
In Transit + On Order (in) Units	
Tot. Src. Avail. Units	1,119
Tot. Src. Avail. Pack Units	
User Tot. Src. Avail. Units	
Manual Push Units	
Unc. Req. Total Units	4,648
Sys. Rpl. Plan Out Units	966
Sys. Rpl. Plan Out Pack Units	
Appr. Rpl. Plan Out Units	
Tot. Avail. Units	966
Tot. Avail. Dur (in)	6.4 w

## LOC Level (R & A) View

The **LOC Level (R & A) View**, under the **By Location** tab, is similar to the SKU Level (R & A) view but the data is presented in a different layout. This view is driven by the location analysis rather than the SKU analysis. For more details regarding the available profiles and the measures within each profile, refer to the SKU Level (R & A) view.

Figure 21-39 LOC Level (R & A) View

Location	User Filter	Revised	LOC Alerts	Actual Sales W-4	Actual Sales W-3	Actual Sales W-2	Actual Sales W-1	Actual	W+0 Units	Fst W+1 Units
1000 Web	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	539	497	471	472	508	472	471
1005 Philadelphia Outlet	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	189	189	189	189	189	205	186
1074 Pittsburgh Outlet	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	189	189	189	189	189	206	188
1075 Newark Outlet	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	189	189	189	189	189	205	187
1076 Baltimore	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	189	189	189	189	189	205	187
1077 Richmond	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	189	189	189	189	189	201	183
1078 Washington D.C.	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	189	189	189	189	189	205	188
1084 Norfolk	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	189	189	189	189	189	203	185
1085 Virginia Beach	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	189	189	189	189	189	203	185
1113 Raleigh	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	189	189	189	189	189	205	187
1164 New Castle	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	189	189	189	189	189	202	185
1172 Allegheny	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	189	189	189	189	189	204	186
1173 Asheville	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	189	189	189	189	189	202	185
1184 Wilmington	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	189	189	189	189	189	204	186
1185 Greensboro	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	189	189	189	189	189	205	187

## LOC-SKU Level (R & A) View

The **LOC-SKU Level (R & A) View**, under the **By Location** tab, is similar to the SKU-LOC Level (R & A) view but the data is presented in a different layout. This view is driven by the location analysis rather than the SKU analysis. For more details regarding the available profiles and the measures within each profile, refer to the SKU-LOC Level (R & A) view.

Figure 21-40 LOC-SKU Level (R & A) View

Product	User Filter PROD - LOC	Reword PROD - LOC	PROD - LOC Alerts	Tot. Dest. Avail. Dur	Tot. Dest. Avail.	Forecast Over LT+RT	RUTL @ Today Units	Unc. Need Total	User Rpl. Fix Locked	Sys. Rpl. Plan In	Sys. Rpl. Plan In Pack
2000001 - KTS Low "Home"	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	1.1 w	6	6.25	102	96			11
2000002 - KTS Low "Home"	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	2.2 w	8	4.19	88	80			8
2000003 - KTS Low "Home"	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	1.0 w	5	5.56	68	63			7
2000004 - "Independence Day"	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	2.2 w	8	5.26	12	4			4
2000005 - "Independence Day"	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	2.6 w	10	3.58	15	5			5
2000006 - "Independence Day"	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	1.2 w	7	6.65	12	5			4
2000007 - "Have Fun in LA"	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	2.0 w	10	7.47	9				
2000008 - "Have Fun in LA"	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	2.3 w	11	7.44	9				
2000009 - "Have Fun in LA"	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	1.1 w	4	6.29	8	4			4
2000010 - 2020 Summer	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	4.7 w	12	4.43	9				
2000011 - 2020 Summer	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	2.6 w	8	2.42	6				
2000012 - 2020 Summer	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	1.3 w	7	6.53	12	5			5
2000013 - "Have Fun" 2020	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	1.9 w	9	58.88	50	41			30
2000014 - "Have Fun" 2020	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	2.4 w	10	34.94	31	21			13
10000010 - Women's Canvas	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	w		4.17	143	143			35

## LOC-VAR Level (R & A) View

The **LOC-VAR Level (R & A) View**, under the **By Location** tab, is similar to the VAR-LOC Level (R & A) view but the data is presented in a different layout. This view is driven by the location analysis rather than the VAR analysis. For more details regarding the available profiles and the measures within each profile the VAR-LOC Level (R & A) view.

Figure 21-41 LOC-VAR Level (R & A) View

Product	User Filter PROD - LOC	Reword PROD - LOC	PROD - LOC Alerts	Tot. Dest. Avail. Units	Tot. Dest. Avail. (w)	Forecast Over LT+RT Units	RUTL @ Today Units	Unc. Need Total Units	User Rpl. Fix Locked Units	Sys. Rpl. Plan In Units	Sys. Rpl. Plan In Pack Units
10000010 - Women's Canvas	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp		w	15.94	475	475			115
10000013 - Women's Canvas	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp		w	78.59	83	83			83
10000016 - Women's Canvas	<input type="checkbox"/>	<input type="checkbox"/>	?	40	0.9 w	43.60	48	10			10
10000019 - Women's Canvas	<input type="checkbox"/>	<input type="checkbox"/>	?	34	0.8 w	24.45	43	10			10
10000022 - Men's Canvas	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	38	0.6 w	694.83	583	545			235
10000025 - Men's Canvas	<input type="checkbox"/>	<input type="checkbox"/>	?	30	0.4 w	151.34	156	126			63
10000029 - KTS Low "Home"	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	19	1.4 w	15.99	258	239			26
10000032 - "Independence"	<input type="checkbox"/>	<input type="checkbox"/>	?	25	2.0 w	15.48	39	14			13
10000035 - "Have Fun in LA"	<input type="checkbox"/>	<input type="checkbox"/>	?	25	1.8 w	21.20	26	4			4
10000038 - 2020 Summer	<input type="checkbox"/>	<input type="checkbox"/>	?	27	2.8 w	13.38	27	5			5
10000041 - "Have Fun" 2020	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp	19	2.1 w	93.82	81	62			43
10000043 - Basketball Training	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp		w	7.67	84	84			
10000047 - Basketball Training	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp		w	7.04	25	25			
10000050 - Printed Five Points	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp		w	10.26	11	11			
10000053 - Printed Five Points	<input type="checkbox"/>	<input type="checkbox"/>	MaxStk MinDsp		w	5.76	9	9			

## Source LOC-SKU Level (R & A) View

The **Source LOC-SKU Level (R & A) View**, under the **By Location** tab, is similar to the SKU-Source LOC Level (R & A) view but the data is presented in a different layout. This view is driven by the source location analysis rather than the SKU analysis. For more details regarding

the available profiles and the measures within each profile, refer to the SKU-Source LOC Level (R & A) view.

**Figure 21-42 Source LOC-SKU Level (R & A) View**

Product	PRODC - LOC Alerts	Src. Avail. (Src) @ Today	Src. Avail. (Src) @ Today Dur (d)	Tot. On Hand Units	In Transit + On Order (in) Units	Tot. Src. Avail. Units	Tot. Src. Avail. Pack Units	User Tot. Src. Avail. Units	Manual Push Units	Unc. Req. Total Units	Sys. Rpl. Plan Out Units
2000001 - KTS Low "Home"		OH	d	200		200					1,516
2000002 - KTS Low "Home"		OH	d	200		200					1,416
2000003 - KTS Low "Home"		OH	d	200		200					1,524
2000004 - "Independence Day"		OH	d	200		200					526
2000005 - "Independence Day"		OH	d	200		200					389
2000006 - "Independence Day"		OH	d	200		200					431
2000007 - "Have Fun in LA"		OH	d								160
2000008 - "Have Fun in LA"		OH	d								90
2000009 - "Have Fun in LA"		OH	d								88
2000010 - 2020 Summer		OH	d								99
2000011 - 2020 Summer		OH	d								97
2000012 - 2020 Summer		OH	d								108
2000013 - "Have Fun" 2020		OH	d								506
2000014 - "Have Fun" 2020		OH	d								510
1000010 - Women's Canvas		OH	d								

## Source LOC-VAR Level (R & A) View

The **Source LOC-VAR Level (R & A) View**, under the **By Location** tab, is similar to the VAR-Source LOC Level (R & A) view but the data is presented in a different layout. This view is driven by the source location analysis rather than the Variant analysis. For more details regarding the available profiles and the measures within each profile, refer to the VAR-Source LOC Level (R & A) view.

**Figure 21-43 Source LOC-VAR Level (R & A) View**

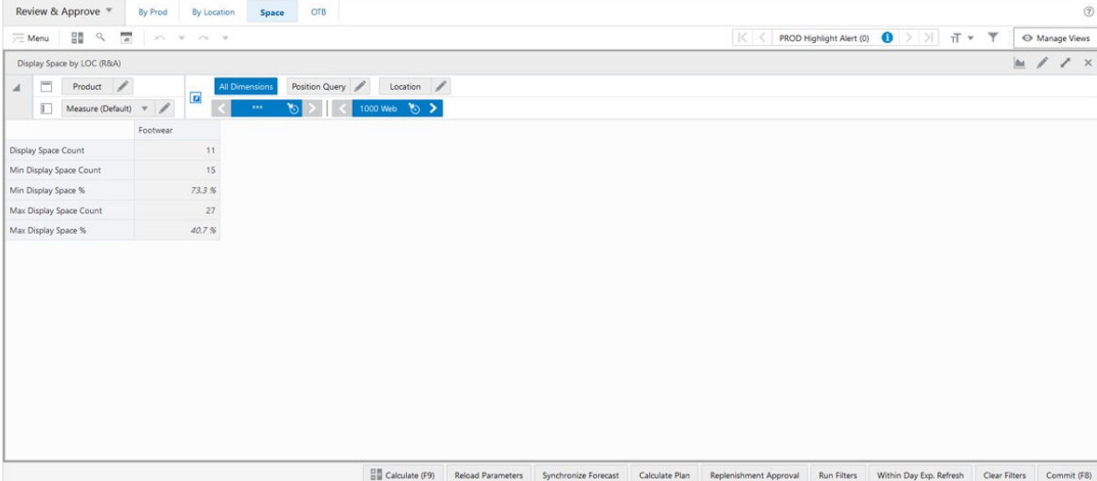
Metric	10000010 -	10000013 -	10000016 -	10000019 -	10000022 - Men's	10000025 - Men's	10000029 - KTS	10000032 -	10000035 - 'Have'	10000038 - 2020	10000041 - 'Have'
PRODC - LOC Alerts											
Src. Avail. (Src) @ Today	OH	OH	OH	OH	OH	OH	OH	OH	OH	OH	OH
Src. Avail. (Src) @ Today Dur (d)	d	d	d	d	d	d	d	d	d	d	d
Tot. On Hand Units							600	600			
In Transit + On Order (in) Units											
Tot. Src. Avail. Units							600	600			
Tot. Src. Avail. Pack Units											
User Tot. Src. Avail. Units											
Manual Push Units											
Unc. Req. Total Units											
Sys. Rpl. Plan Out Units							4,457	1,347	338	304	1,016
Sys. Rpl. Plan Out Pack Units											
Appr. Rpl. Plan Out Units											
Tot. Avail. Units											
Tot. Avail. Dur (w)	w	w	w	w	w	w	w	w	w	w	w

## Display Space by LOC (R & A) View

The **Display Space by LOC (R & A) View**, under the **Space** tab, allows you to manage the display space parameters that is used by IPOCS-Lifecycle Allocation and Replenishment to alert you for replenishment plan situations where merchandise reached the maximum display count or the minimum display count is not reached at a location or locations. The parameters managed in this view are:

- **Min Display Space:** Refers to the minimum display stock. It is based only on active items.
- **Max Display Space:** Refers to the available space for display stock. It is based only on active items.

**Figure 21-44 Display Space by LOC (R & A) View**



Footwear	
Display Space Count	11
Min Display Space Count	15
Min Display Space %	73.3 %
Max Display Space Count	27
Max Display Space %	40.7 %

### Display Space by LOC (R & A) View - Default Profile Measures

The Default measure profile available in the Display Space by LOC (R & A) view contains the following measures.

#### Display Space Count

The Display Space Count is a calculated measure used to indicate the total number of products, for the merchandise level (for example, Brand), that have available inventory units at the location.

#### Min Display Space Count

The Min Display Space Count is an editable measure used to enter the minimum amount of products, for the merchandise level, that should be in the display at the location. This value is then used by IPOCS-Lifecycle Allocation and Replenishment alerts to alert you if locations are not reaching their minimum display for certain merchandise.

#### Min Display Space %

The Min Display Space % is a calculated measure used to indicate the percentage of minimum display fulfilled using the minimum display count entered by you and the display count available at the location. If the percentage is lower than 100% then the minimum display has

not been reached. If the percentage is greater than 100% then the location has more products than the minimum specified. The value of this measure is the result of the formula:

**Figure 21-45 Calculation**

$$100 * \frac{DisplaySpaceCount}{MinDisplaySpaceCount}$$

### **Max Display Space Count**

The Max Display Space Count is an editable measure used to enter the maximum amount of products, for the merchandise level, that can be in the display at the location. This value is then used by IPOCS-Lifecycle Allocation and Replenishment alerts to alert you if locations are exceeding their maximum display for certain merchandise.

### **Max Display Space %**

The Max Display Space % is a calculated measure used to indicate the percentage of maximum display fulfilled using the maximum display count entered by you and the display count available at the location. If the percentage is lower than 100% then the maximum display has not been reached. If the percentage is greater than 100% then the location is exceeding the maximum number of products specified. The value of this measure is the result of the formula:

**Figure 21-46 Calculation**

$$100 * \frac{DisplaySpaceCount}{MaxDisplaySpaceCount}$$

## Display Space by SKU (R & A) View

The **Display Space by SKU (R & A) View**, under the **Space tab**, is similar to the Display Space by LOC (R & A) view but the data is presented in a different layout. This view is driven by the SKU analysis rather than the Location analysis. For more details regarding the available profile and the measures within the profile, refer to the Display Space by Loc (R & A) view.

**Figure 21-47 Display Space by SKU (R & A) View**

	1000 Web	1005 Philadelphia	1074 Pittsburgh	1075 Newark Outlet	1076 Baltimore	1077 Richmond	1078 Washington	1084 Norfolk	1085 Virginia Beach	1113 Raleigh	1164 New Castle	1172
Display Space Count	11	11	11	11	11	11	11	11	11	11	11	11
Min Display Space Count	15	15	15	15	15	15	15	15	15	15	15	15
Min Display Space %	73.3 %	73.3 %	73.3 %	73.3 %	73.3 %	73.3 %	73.3 %	73.3 %	73.3 %	73.3 %	73.3 %	73.3 %
Max Display Space Count	27	27	27	27	27	27	27	27	27	27	27	27
Max Display Space %	40.7 %	40.7 %	40.7 %	40.7 %	40.7 %	40.7 %	40.7 %	40.7 %	40.7 %	40.7 %	40.7 %	40.7 %

## Stockroom Space by LOC (R & A) View

The **Stockroom Space by LOC (R & A) View**, under the **Space tab**, allows you to manage the stockroom space parameters that is used by IPOCS-Lifecycle Allocation and Replenishment to alert you for replenishment plan situations where merchandise reached the maximum stockroom available at a location or locations. The parameter managed in this view is:

- **Max Stockroom Space:** The available space to keep the stock. It is based on total inventory.

**Figure 21-48 Stockroom Space by LOC (R & A) View**

	Footwear
Tot. Avail. Units	864
Max Stockroom Space	350.00
Max Stockroom Space UOM	Units
Max Stockroom Space %	246.9 %

### Stockroom Space by LOC (R & A) View - Default Profile Measures

The Default measure profile available in the Stockroom Space by LOC (R & A) view contains the following measures.

**Tot. Avail. Units**

The Tot. Avail. Units is a calculated measure used to indicate the total available inventory units, for the merchandise level (for example, Brand), at the location. The total available inventory for the merchandise level is the sum of all products available inventory units belonging to that merchandise level. The total available inventory includes on-hand, in-transit and on-order inventory.

**Max Stockroom Space**

The Max Stockroom Space is an editable measure used to enter the maximum inventory units, for the merchandise level, that can be stocked at the location. This value is then used by IPOCS-Lifecycle Allocation and Replenishment alerts to alert you if locations are reaching/exceeding their maximum stock capacity for certain merchandise.

**Max Stockroom Space UOM**

The Max Stockroom Space UOM is an editable measure used to enter the unit of measure (UOM) for the max stockroom space entered in the measure Max Stockroom Space. By default the unit of measure Units is used by IPOCS-Lifecycle Allocation and Replenishment.

**Max Stockroom Space %**

The Max Stockroom Space % is a calculated measure used to indicate the percentage of stock room fulfilled using the maximum stockroom entered by you and the available inventory at the location. If the percentage is lower than 100% then the maximum stockroom has not been reached. If the percentage is greater than 100% then the location is exceeding the maximum stockroom capacity. The value of this measure is the result of the formula:

**Figure 21-49 Calculation**

$$100 * \frac{DisplaySpaceCount}{MaxDisplaySpaceCount}$$

## Stockroom Space by SKU (R & A) View

The **Stockroom Space by SKU (R & A) View**, under the **Space tab**, is similar to the Stockroom Space by LOC (R & A) view but the data is presented in a different layout. This view is driven by the SKU analysis rather than the Location analysis. For more details regarding the available profile and the measures within the profile, refer to the Stockroom Space by Loc (R & A) view.



Figure 21-50 Stockroom Space by SKU (R & A) View

	1000 Web	1005 Philadelphia	1074 Pittsburgh	1075 Newark Outlet	1076 Baltimore	1077 Richmond	1078 Washington	1084 Norfolk	1085 Virginia Beach	1113 Raleigh	1164 New Castle	1172
Tot Avail. Units	864	466	515	516	502	483	502	517	533	478	492	
Max Stockroom Space	350.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00	
Max Stockroom Space UOM	Units	Units	Units	Units	Units	Units	Units	Units	Units	Units	Units	Units
Max Stockroom Space %	246.9 %	133.1 %	147.1 %	147.4 %	143.4 %	138.0 %	143.4 %	147.7 %	152.3 %	136.6 %	140.6 %	

## OTB (R & A) View

The **OTB (R & A) View**, under the **OTB tab**, allows you to review the open to buy values and take the necessary action to amend the system suggested replenishment, if needed. IPOCS-Lifecycle Allocation and Replenishment has the following open-to-buy concepts:

- **Open-to-Buy Residual (OTB Residual)** is the remaining under-budget OTB available based on the replenishment plan value and the OTB Value
- **Open-to-Buy Exceed (OTB Exceed)** would be the out-of-budget OTB based on the replenishment plan value and the OTB Value.

Figure 21-51 Open-to-Buy Concept



**Figure 21-52 OTB (R & A) View**

Product	Measure (Default)	Value
1312Casual*	OTB Value	€
	Rpl. Plan In Value	€516.00
	OTB Residual Value	€
	OTB Residual %	%
	OTB Exceed Value	€
	OTB Exceed %	%
	OTB Threshold %	20.0 %
1322Casual*	OTB Value	€
	Rpl. Plan In Value	€91.00
	OTB Residual Value	€
	OTB Residual %	%
	OTB Exceed Value	€
	OTB Exceed %	%
	OTB Threshold %	20.0 %

**OTB (R & A) View - Default Profile Measures**

The Default measure profile available in the OTB (R & A) view contains the following measures.

**OTB Value**

The OTB Value is a loaded measure, from an external system, used to indicate the open-to-buy budget value for the merchandise and location combination.

**Rpl. Plan In Value**

The Rpl. Plan In Value is a calculated measure used to indicate suggested replenishment plan in value based on the system recommended replenishment units and the loaded open-to-buy price for the merchandise and location combination. The value of this measure is the result of the formula:

**Figure 21-53 Calculation**

$$Sys. Rpl. PlanInUnits * OTBPriceValue$$

**OTB Residual Value**

The OTB Residual Value is a calculated measure used to indicate the open-to-buy value remaining from the OTB Value assuming the suggested replenishment plan (Rpl. Plan in Value). If the suggested replenishment plan exceeds the available open-to-buy value then this measure is empty. The value of this measure is the result of the formula:

**Figure 21-54 Calculation**

$$OTBValue - Rpl. PlanInValue$$

**OTB Residual %**

The OTB Residual % is a calculated measure used to indicate in percentage how much of the open-to-buy values is remaining. If the suggested replenishment plan exceeds the available open-to-buy value then this measure is empty. The value of this measure is the result of the formula:

**Figure 21-55 Calculation**

$$100 * \frac{OTBResidualValue}{OTBValue}$$

**OTB Exceed Value**

The OTB Exceed Value is a calculated measure used to indicate the value that is exceeded from the open-to-buy value (OTB Value) assuming the suggested replenishment plan (Rpl. Plan in Value). If the suggested replenishment plan does not exceed the available open-to-buy value then this measure is empty. The value of this measure is the result of the formula:

**Figure 21-56 Calculation**

$$Rpl. PlanInValue - OTBValue$$

**OTB Exceed %**

The OTB Exceed % is a calculated measure used to indicate in percentage how much of the open-to-buy value is exceeded in comparison to the open-to-buy value (OTB Value). If the suggested replenishment plan does not exceed the available open-to-buy value, then this measure is empty. The value of this measure is the result of the formula:

**Figure 21-57 Calculation**

$$100 * \frac{OTBExceedValue}{OTBValue}$$

## Inventory Plan Step

In this step, you can review weekly inventory plans calculated by IPOCS-Lifecycle Allocation and Replenishment and approve them. The calculated weekly inventory plans are based on the frozen inbound units, weekly demand, and the Inventory Plan Parameters. This step contains these views:

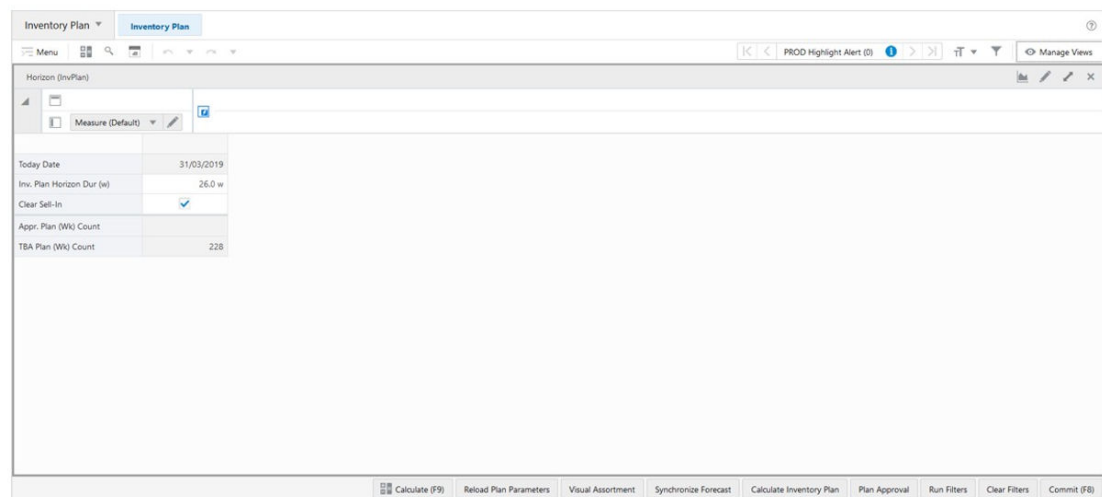
- [Horizon \(InvPlan\) View](#)

- SKU-LOC Level (InvPlan) View
- SKU-LOC-DAY Level (InvPlan) View
- SKU-LOC-WEEK Level (InvPlan) View
- SKU-Source LOC-WEEK Level (R & A) View

## Horizon (InvPlan) View

The **Horizon (InvPlan) View**, under the **Inventory Plan tab**, allows you to manage the time horizon that the inventory plan calculation should consider. For example, if the plan horizon is 10 then IPOCS-Lifecycle Allocation and Replenishment calculates the Inventory Plan for the next 10 weeks (from today) only.

**Figure 21-58 Horizon (InvPlan) View**



### Horizon (InvPlan) View - Default Profile Measures

The Default measure profile available in the Horizon (InvPlan) view contains the following measures.

#### Today Date

The Today Date is a loaded read-only measure used to display the system date that is calculated by IPOCS-Lifecycle Allocation and Replenishment batch.

#### Inv. Plan Horizon (w)

The Inv. Plan Horizon (w) is an editable measure used to enter the number of weeks, in the future, that should have inventory plan calculated.

#### Clear Sell-In

The Clear Sell-In is an editable measure used to define whether the inventory calculation should clear the sell-in forecast or not before starting the inventory plan calculations.

#### Appr. Plan (Wk) Count

The Appr. Plan (Wk) Count is a calculated measure used to indicate the total number of assorted product and location combinations with approved orders for the current week.

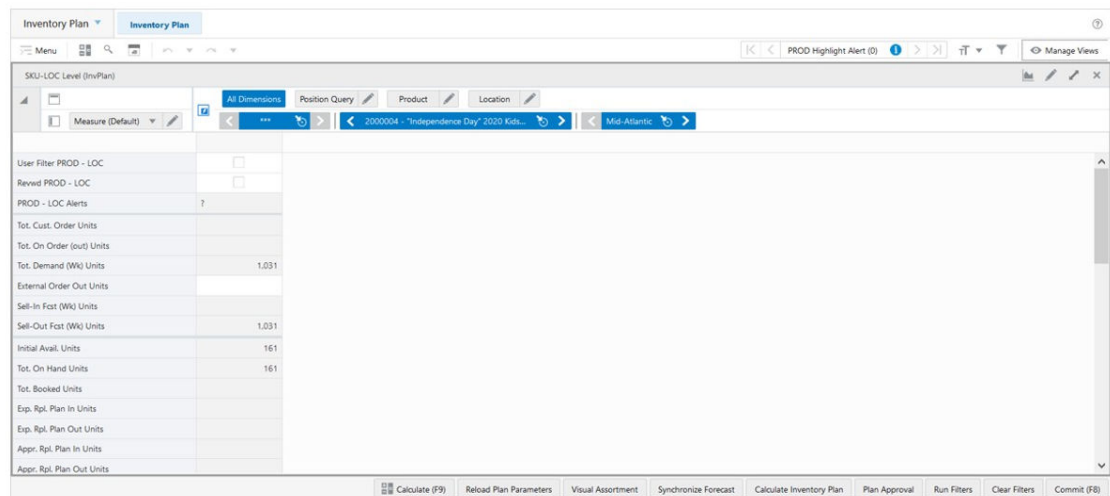
## TBA Plan (Wk) Count

The TBA Plan (Wk) Count is a calculated measure used to indicate the total number of assorted product and location combinations that need the orders to be approved manually for the current week.

## SKU-LOC Level (InvPlan) View

The **SKU-LOC Level (InvPlan) View**, under the **Inventory Plan tab**, allows you to review and adjust the calculated inventory plan at the product and location levels.

**Figure 21-59 SKU-LOC Level (InvPlan) View**



Measure (Default)	Value
User Filter PROD - LOC	
Revwd PROD - LOC	
PROD - LOC Alerts	?
Tot. Cust. Order Units	
Tot. On Order (out) Units	
Tot. Demand (Wk) Units	1,031
External Order Out Units	
Sell-In Fcst (Wk) Units	
Sell-Out Fcst (Wk) Units	1,031
Initial Avail. Units	161
Tot. On Hand Units	161
Tot. Booked Units	
Exp. Rpl. Plan In Units	
Exp. Rpl. Plan Out Units	
Appr. Rpl. Plan In Units	
Appr. Rpl. Plan Out Units	

### SKU-LOC Level (InvPlan) View - Default Profile Measures

The Default measure profile available in the SKU-LOC Level (InvPlan) view contains the following measures.

#### User Filter PROD-LOC

The User Filter PROD-LOC is an editable measure used to apply a filter to the views within the Review & Approve workspace by the selected product and location combinations. When a product and location combination is selected, and after the workspace calculation (either **Calculate** or **F9**) is run, the views in the Review & Approve workspace is filtered based on the selected product and locations combinations.

#### Revwd PROD - LOC

The Revwd PROD - LOC is an editable measure used to indicate that the product and location combination alerts have been reviewed.

#### PROD - LOC Alerts

The PROD - LOC Alerts is a calculated measure used to display the Alert Short Descr. of all the alerts that got triggered for the product and location combination.

#### Tot. Cust. Order Units

The Total Customer Order Units is the same as the one in the inventory profile under the SKU-LOC Level (R & A) view. Refer to the measure, Tot. Cust. Order Units, in the Measures: Inventory Profile under the SKU-LOC Level (R & A) view in the Default Profile Measures.

**Tot. On Order (out) Units**

The Tot. On Order (out) Units is the same as the one in the inventory profile under the SKU-LOC Level (R & A) view. Refer to the measure, Tot. On Order (out) Units, in the Measures: Inventory Profile under the SKU-LOC Level (R & A) view in the Default Profile Measures.

**Tot. Demand (Wk) Units**

The Tot. Demand (Wk) Units is the same as the one in the default profile under the SKU-LOC-WEEK Level (InvPlan) view. Refer to the measure, Tot. Demand (Wk) Units, in the Default Profile Measures under the SKU-LOC-WEEK Level (InvPlan) view in the Default Profile Measures.

**External Order Out Units**

The External Order Out Units is an editable measure used to enter the weekly order data coming outside of IPOCS-Lifecycle Allocation and Replenishment. In this view, the measure is aggregated and when changed the value is spread proportionally across the weeks within the workspace (you can check the spread value in the SKU-LOC-WEEK Level(InvPlan) view).

**Sell-In Fcst (Wk) Units**

The Sell-In Fcst (Wk) Units is the same as the one in the default profile under the SKU-LOC-WEEK Level (InvPlan) view. Refer to the measure, Sell-In Fcst (Wk) Units, in the Default Profile Measures under the SKU-LOC-WEEK Level (InvPlan) view in the Default Profile Measures.

**Sell-Out Fcst (Wk) Units**

The Sell-Out Fcst (Wk) Units is the same as the one in the default profile under the SKU-LOC-WEEK Level (InvPlan) view. Refer to the measure, Sell-Out Fcst (Wk) Units, in the Default Profile Measures under the SKU-LOC-WEEK Level (InvPlan) view in the Default Profile Measures.

**Initial Avail. Units**

The Initial Avail. Units is a calculated measure used to indicate the initial quantity of units available for the product and location combination considering on-hand and booked inventory plus in and out transfers (approved and exported).

**Tot. On Hand Units**

The Tot. On Hand Units is the same as the one in the availability profile under the SKU-LOC Level (R & A) view. Refer to the measure, Tot. On Hand Units, in the Measures: Availability Profile under the SKU-LOC Level (R & A) view in the Default Profile Measures.

**Tot. Booked Units**

The Tot. Booked Units is the same as the one in the inventory profile under the SKU-LOC Level (R & A) view. Refer to the measure, Tot. Booked Units, in the Measures: Inventory Profile under the S KU- LOC Level (R & A) view in the Default Profile Measures.

**Exp. Rpl. Plan In Units**

The Exp. Rpl. Plan In Units is the same as the one in the availability profile under the SKU-LOC Level (R & A) view. Refer to the measure, Exp. Rpl. Plan In Units, in the Measures: Availability Profile under the SKU-LOC Level (R & A) view in the Default Profile Measures.

**Exp. Rpl. Plan Out Units**

The Exp. Rpl. Plan Out Units is the same as the one in the availability profile under the SKU-LOC Level (R & A) view. Refer to the measure, Exp. Rpl. Plan Out Units, in the Measures: Availability Profile under the SKU-LOC Level (R & A) view in the Default Profile Measures.

**Appr. Rpl. Plan In Units**

The Appr. Rpl. Plan In Units is the same as the one in the default profile under the SKU-LOC Level (R & A) view. Refer to the measure, Appr. Rpl. Plan In Units under the SKU-LOC Level (R & A) view, in the Default Profile Measures.

**Appr. Rpl. Plan Out Units**

The Appr. Rpl. Plan Out Units is the same as the one in the availability profile under the SKU-LOC Level (R & A) view. Refer to the measure, Appr. Rpl. Plan Out Units, in the Measures: Availability Profile under the SKU-LOC Level (R & A) view in the Default Profile Measures.

**Appr. Transfer In Units**

The Appr. Transfer In Units is the same as the one in the availability profile under the SKU-LOC Level (R & A) view. Refer to the measure, Appr. Transfer In Units, in the Measures: Availability Profile under the SKU-LOC Level (R & A) view in the Default Profile Measures.

**Appr. Transfer Out Units**

The Appr. Transfer Out Units is the same as the one in the availability profile under the SKU-LOC Level (R & A) view. Refer to the measure, Appr. Transfer Out Units, in the Measures: Availability Profile under the SKU-LOC Level (R & A) view in the Default Profile Measures.

**Frozen Inbound Units**

The Frozen Inbound Units is the total committed inbound inventory given to a destination location. In this view, the measure is aggregated (you can check the weekly value in the SKU-LOC-WEEK Level (InvPlan) View).

**Tot. In Transit Units**

The Tot. In Transit Units is the same as the one in the inventory profile under the SKU-LOC Level (R & A) view. Refer to the measure, Tot. In Transit Units, in the Measures: Inventory Profile under the SKU-LOC Level (R & A) view in the Default Profile Measures.

**Tot. On Order (in) Units**

The Tot. On Order (in) Units is the same as the one in the inventory profile under the SKU-LOC Level (R & A) view. Refer to the measure, Tot. On Order (in) Units, in the Measures: Inventory Profile under the SKU-LOC Level (R & A) view in the Default Profile Measures.

**User Locked Plan (Wk) Units**

The User Locked Plan (Wk) Units is an editable measure used to adjust the plan by entering a new value. In this view, the measure is aggregated and when changed the value is spread proportionally across the weeks within the workspace (you can check the spread value in the SKU-LOC-WEEK Level (InvPlan) view).

**Sys. Plan (Wk) Units**

The Sys. Plan (Wk) Units is a calculated measure used to indicate the proposed quantity that the system has calculated to fulfil the Sell-Out forecast while maintaining the inventory at the Sys Min Level at EOP (week). In this view, the measure is aggregated (you can check the weekly value in the SKU-LOC-WEEK Level (InvPlan) view).

**Shortage (Wk) Units**

The Shortage (Wk) Units is a calculated measure used to indicate the shortage in units to fulfill the demand. In this view, the measure is aggregated (you can check the weekly value in the S KU-LOC-WEEK Level (InvPlan) view).

#### **Primary Source @ Today**

The Primary Source @ Today is a loaded measure used to indicate the applied primary source for the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

#### **Lead Time @ Today Dur (d)**

The Lead Time @ Today Dur (d) is a calculated measure used to indicate the applied lead time, in days, for the product and location combination at the system date. The lead time is calculated from the current BOD assigned to the product and location combination.

#### **LLC @ Today**

The LLC @ Today is a calculated measure used to indicate the low-level code applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

#### **Min Order Qty Units**

The Min Order Quantity Units is the same as the one in the parameters profile under the SKU-LOC Level (R & A) view. Refer to the measure, Min Order Quantity Units, in the Measures: Parameters Profile under the SKU-LOC Level (R & A) view in the Default Profile Measures.

#### **Mult. Order Qty Units**

The Mult. Order Quantity Units is the same as the one in the parameters profile under the SKU-LOC Level (R & A) view. Refer to the measure, Mult. Order Quantity Units, in the Measures: Parameters Profile under the SKU-LOC Level (R & A) view in the Default Profile Measures.

#### **Order Rounding Threshold @ Today %**

The Order Rounding Threshold @ Today % is a calculated measure used to indicate the percentage to round up the orders applied to the product and location combination at the system date and can be overridden. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Replenishment Parameters workspace.

#### **Min Method @ Today**

The Min Method @ Today is a calculated measure used to indicate the inventory planning method, to calculate the System Minimum value, applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Replenishment Parameters workspace.

#### **Min Method Change**

The Min Method Change is an editable measure to override the assigned inventory plan method to calculate the System Minimum value (you can review or manage the weekly value in the SKU-LOC- WEEK Level (InvPlan) View). For more details about the possible values check the measure Min Method in the SKU-LOC view within the Replenishment Parameters workspace.

#### **Min Fixed @ Today**



The Min Fixed @ Today is a calculated measure used to indicate how the Fixed inventory planning method calculates the System Minimum value for the product and location combination at the system date. For more details about the measure, refer to the same measure description in the view SKU- LOC within the Replenishment Parameters workspace.

**Min Fixed @ Today Units**

The Min Fixed @ Today Units is a calculated measure used to indicate the minimum fixed quantity applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Replenishment Parameters workspace.

**ROL @ Today Units**

The ROL @ Today Units is the same as the one in the plan profile under the SKU-LOC Level (R & A) view. Refer to the measure, ROL @ Today Units, in the Measures: Plan Profile under the SKU-LOC Level (R & A) view in the Default Profile Measures.

**RUTL @ Today Units**

The RUTL @ Today Units is the same as the one in the default profile under the SKU-LOC Level (R & A) view. Refer to the measure, RUTL @ Today Units, in the Default Profile Measures under the SKU- LOC Level (R & A) view in the Default Profile Measures.

**Min Fixed Change Units**

The Min Fixed Change Units is an editable measure used to override the minimum quantity used when the Fixed method is applied. This value is used in the calculation instead of the Min Fixed @ Today Units, the RUTL @ Today Units or the ROL @ Today Units if the method to calculate the System Minimum value is Fixed. You can review or manage the weekly value in the SKU-LOC-WEEK Level (InvPlan) view.

**Min Fwd Cov. @ Today Dur (d)**

The Min Fwd Cov. @ Today Dur (d) is a calculated measure used to indicate the minimum number of days of cover applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Replenishment Parameters workspace.

**Min Fwd Cov. Change Dur (d)**

The Min Fwd Cov. Change Dur (d) is an editable measure used to override the minimum number of days of cover (Min Fwd Cov. @ Today Dur (d)) applied to the product and location combination at the system date.

**Max Method @ Today**

The Max Method @ Today is a calculated measure used to indicate the inventory planning method, to calculate the System Maximum value, applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Replenishment Parameters workspace.

**Max Method Change**

The Max Method Change is an editable measure to override the assigned inventory plan method to calculate the System Maximum value. For more details about the possible values check the measure the Max Method in the SKU-LOC view within the Replenishment Parameters workspace.

**Max Fwd Cov. @ Today Dur (d)**

The Max Fwd Cov. @ Today Dur (d) is a calculated measure used to indicate the maximum number of days of cover applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Replenishment Parameters workspace.

#### **Max Fixed @ Today Units**

The Max Fixed @ Today Units is a calculated measure used to indicate the maximum fixed quantity applied to the product and location combination at the system date. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Replenishment Parameters workspace.

#### **Max Fixed Change Units**

The Max Fixed Change Units is an editable measure used to override the maximum quantity to be used when the Fixed method is applied. This value is used in the calculation instead of the Max Fixed @ Today Units if the method to calculate the System Maximum value is Fixed.

#### **Max Fwd Cov. Change Dur (d)**

The Max Fwd Cov. Change Dur (d) is an editable measure to override the maximum number of days of cover (Max Fwd Cov. @ Today Dur (d)) applied to the product and location combination at the system date.

#### **SKU-LOC Level (InvPlan) - Measures: InOutBound Profile**

The InOutBound measure profile available in this view contains a subset of the measures in the Default measure profile. For more information regarding the description of the measure, review the Default Profile Measures in this view. This profile contains the following measure that is not in the Default profile.

##### **Inv. PL Mask**

The Inv. PL Mask is a calculated measure used to indicate whether the product and location combination is eligible for the inventory plan. When selected, it is eligible. When clear, it is ineligible.

#### **SKU-LOC Level (InvPlan) - Measures: Parameters Profile**

The Parameters measure profile available in this view contains a subset of the measures in the Default measure profile. For more information regarding the measures description check the Default Profile Measures in this view. This profile contains the following measures that are not in the Default profile.

##### **Inv. PL Mask**

The Inv. PL Mask is a calculated measure used to indicate whether the product and location combination is eligible for the inventory plan. When selected, it is eligible. When clear, it is ineligible.

##### **PL BOD**

The PL BOD is a loaded measure used to indicate the bill of distribution applied to the product and location combination. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Supply Chain Network workspace.

##### **PL Ivp.**

The PL Ivp. is a loaded measure used to indicate the inventory planning parameter applied to the product and location combination. For more details about the measure, refer to the same measure description in the SKU-LOC view within the Replenishment Parameters workspace.

## SKU-LOC-DAY Level (InvPlan) View

The **SKU-LOC-DAY Level (InvPlan) View**, under the **Inventory Plan** tab, allows you to review approved and the exported inventory plan at the product and location levels by date (day).

**Figure 21-60 SKU-LOC-DAY Level (InvPlan) View**

	Tot. In Transit Units	Tot. On Order (in) Units	Tot. Cust. Order Units	Tot. On Order (out) Units	Appr. Rpl. Plan Out (day) Units	Exp. Rpl. Plan Out (day) Units	Appr. Rpl. Plan In (day) Units	Exp. Rpl. Plan In (day) Units
4/1/2018								
4/2/2018								
4/3/2018								
4/4/2018								
4/5/2018								
4/6/2018								
4/7/2018								
4/8/2018								
4/9/2018								
4/10/2018								
4/11/2018								
4/12/2018								
4/13/2018								
4/14/2018								
4/15/2018								

### SKU-LOC-DAY Level (InvPlan) View - Default Profile Measures

The Default measure profile available in the SKU-LOC-DAY Level (InvPlan) view contains the following measures.

#### Tot. In Transit Units

The Tot. In Transit Units is the same as the one in the default profile under the SKU-LOC-WEEK Level (InvPlan) view. Refer to the measure, Tot. In Transit Units, in the Default Profile Measures under the SKU-LOC-WEEK Level (InvPlan) view in the Default Profile Measures.

#### Tot. On Order (in) Units

The Tot. On Order (in) Units is the same as the one in the default profile under the SKU-LOC-WEEK Level (InvPlan) view. Refer to the measure, Tot. On Order (in) Units, in the Default Profile Measures under the SKU-LOC-WEEK Level (InvPlan) view in the Default Profile Measures.

#### Tot. Cust. Order Units

The Tot. Cust. Order Units is the same as the one in the default profile under the SKU-LOC-WEEK Level (InvPlan) view. Refer to the measure, Tot. Cust. Order Units, in the Default Profile Measures under the SKU-LOC-WEEK Level (InvPlan) view in the Default Profile Measures.

#### Tot. On Order (out) Units

The Tot. On Order (out) Units is the same as the one in the default profile under the SKU-LOC-WEEK Level (InvPlan) view. Refer to the measure, Tot. On Order (out) Units, in the Default Profile Measures under the SKU-LOC-WEEK Level (InvPlan) view in the Default Profile Measures.

#### Appr. Rpl. Plan Out (day) Units

The Appr. Rpl. Plan Out (day) Units is the same as the one in the default profile under the SKU-LOC-WEEK Level (InvPlan) view. Refer to the measure, Appr. Rpl. Plan Out (day) Units, in the Default Profile Measures under the SKU-LOC-WEEK Level (InvPlan) view in the Default Profile Measures.

**Exp. Rpl. Plan Out (day) Units**

The Exp. Rpl. Plan Out (day) Units is the same as the one in the default profile under the SKU-LOC-WEEK Level (InvPlan) view. Refer to the measure, Exp. Rpl. Plan Out (day) Units, in the Default Profile Measures under the SKU-LOC-WEEK Level (InvPlan) view in the Default Profile Measures.

**Appr. Rpl. Plan In (day) Units**

The Appr. Rpl. Plan In (day) Units is the same as the one in the default profile under the SKU-LOC-WEEK Level (InvPlan) view. Refer to the measure, Appr. Rpl. Plan In (day) Units, in the Default Profile Measures under the SKU-LOC-WEEK Level (InvPlan) view in the Default Profile Measures.

**Exp. Rpl. Plan In (day) Units**

The Exp. Rpl. Plan In (day) Units is the same as the one in the default profile under the SKU-LOC-WEEK Level (InvPlan) view. Refer to the measure, Exp. Rpl. Plan In (day) Units, in the Default Profile Measures under the SKU-LOC-WEEK Level (InvPlan) view in the Default Profile Measures.

## SKU-LOC-WEEK Level (InvPlan) View

The **SKU-LOC-WEEK Level (InvPlan) View**, under the **Inventory Plan** tab, allows you to review, adjust and approve the calculated inventory plan at the product and location levels by week. You can for example review week-by-week orders that are coming into the warehouses and then sent from warehouses to stores.

**Figure 21-61 SKU-LOC-WEEK Level (InvPlan) View**

Calendar	Tot. Cust. Order Units	Tot. On Order (w) Units	Tot. Demand (Wk) Units	External Order Out Units	Appr. Rpl. Plan Out (day) Units	Exp. Rpl. Plan Out (day) Units	Sell-In Fcst (Wk) Units	Sell-Out Fcst (Wk) Units	Frozen Inbound Units	Tot. In Transit Units	Tot. On Order (in) Units	Appr. Rpl. Plan (day) Units
all [Calendar]			1,031						1,031			
4/7/2018												
4/14/2018												
4/21/2018												
4/28/2018												
5/5/2018												
5/12/2018												
5/19/2018												
5/26/2018												
6/2/2018												
6/9/2018												
6/16/2018												
6/23/2018												
6/30/2018												

**SKU-LOC-WEEK Level (InvPlan) View - Default Profile Measures**

The Default measure profile available in the SKU-LOC-WEEK Level (InvPlan) view contains the following measures.

**Tot. Cust. Order Units**

The Tot. Cust. Order Units is a calculated measure used to indicate the total customer order units for the product and location combination. The total customer orders include the customer orders loaded into IPOCS-Lifecycle Allocation and Replenishment plus the customer orders for the replacement/phase-out product, if any.

**Tot. On Order (out) Units**

The Tot. On Order (out) Units is a calculated measure used to indicate the total on-order inventory units out from the source locations (for example, warehouse). The total on-order (out) units includes the on-order inventory loaded into IPOCS-Lifecycle Allocation and Replenishment plus the on-order (out) inventory units for the replacement/phase-out product, if any.

**Tot.Demand (Wk) Units**

The Tot.Demand (Wk) Units is a calculated measure used to indicate the total weekly demand for the product and location combination.

**External Order Out Units**

The External Order Out Units is an editable measure used to enter the weekly order data coming outside of IPOCS-Lifecycle Allocation and Replenishment.

**Appr. Rpl. Plan Out (day) Units**

The Appr. Rpl. Plan Out (day) Units is a calculated measure used to indicate the source location (for example, warehouse) approved replenishment units for the product and location combination, per day.

**Exp. Rpl. Plan Out (day) Units**

The Exp. Rpl. Plan Out (day) Units is a calculated measure used to indicate the source location (for example, warehouse) replenishment planned units, per day, to be exported from the batch for the product and location combination.

**Sell-In Fcst (Wk) Units**

This is an editable measure used to enter the weekly demand at the source location for the product and location combination.

**Sell-Out Fcst (Wk) Units**

The Sell-In Fcst (Wk) Units is a calculated measure used to indicate the weekly demand at the source location for the product coming from the location's demand (destination location).

**Frozen Inbound Units**

The Frozen Inbound Units is the total committed inbound inventory to a given destination location.

**Tot. In Transit Units**

The Tot. In Transit Units is a calculated measure used to display your comment for the in-transit inventory and your comment for the phase-out item's inventory, if any.

**Tot. On Order (in) Units**

The Tot. On Order (in) Units is a calculated measure used to indicate the total on-order inventory units. The total on-order units include the on-order inventory loaded into IPOCS-Lifecycle Allocation and Replenishment plus the on-order inventory units for the replacement/phase-out product, if any.

**Appr. Rpl. Plan In (day) Units**

The Appr. Rpl. Plan In (day) Units is a calculated measure used to indicate the approved replenishment units for the product and location combination, per day.

**Exp. Rpl. Plan In (day) Units**

The Exp. Rpl. Plan In (day) Units is a calculated measure used to indicate the replenishment planned units, per day, to be exported from the batch for the product and location combination.

**BOP (Wk) Units**

The BOP (Wk) Units is a calculated measure used to indicate the beginning of period inventory units. In this view you can review the available inventory units at the beginning of each week.

**Revw Cal. (Wk) @ Today**

The Revw Cal. (Wk) @ Today is a loaded measure used to indicate whether the week is a review week or not. You can override the loaded value. For more details about the measure, refer to the same measure description in the SKU-LOC view-Week within the Supply Chain Network workspace.

**Rcpt Cal. (WK) @ Today**

The Rcpt Cal. (WK) @ Today is a loaded measure used to indicate whether the week is a receipt week or not. You can override the loaded value. For more details about the measure, refer to the same measure description in the SKU-LOC view-Week within the Supply Chain Network workspace.

**User Locked Plan (Wk) Units**

The User Locked Plan (Wk) Units is an editable measure used to adjust the weekly inventory plan by entering a new value for the weeks that need to be adjusted.

**Sys. Plan (Wk) Units**

The Sys. Plan (Wk) Units is a calculated measure used to indicate the proposed quantity that the system has calculated, week by week, to fulfill the Sell-Out forecast while maintaining the inventory at the Sys Min Level at EOP (week).

**Sys. Action**

The Sys. Action is a calculated measure used to indicate the action that is triggered by the system for the inventory plan calculation. Valid values are:

- **FZR**  
Frozen—the system does not consider the week for proposal or any action, as it considers the item has not started yet.
- **TBA**  
To Be Approved—the system is suggesting a proposal for replenishment that needs to be approved by you.

**TBA Plan (Wk)**

The TBA Plan (Wk) is a calculated measure used to indicate that the plan suggested by the system needs to be approved for the product, location, and week combination.

**Appr. Plan (Wk)**

The Appr. Plan (Wk) is a calculated measure used to indicate if the plan is approved for the product, location, and week combination.

**Appr. Plan (Wk) Units**

The Appr. Plan (Wk) Units is a calculated measure used to indicate the order in units that is approved for the product, location, and week combination.

**Appr. Plan (Wk) User ID**

The Appr. Plan (Wk) User ID is a calculated measure used to audit the **Plan Approval** action button. It is populated with the user-identifier that last ran the Inventory Plan Approval action.

**Appr. Plan (Wk) Date**

Appr. Plan (Wk) Date is a calculated measure used to audit the **Plan Approval** action button. It is populated with the user-identifier that last ran the Inventory Plan Approval action.

**Exp. Plan (Wk) Units**

The Exp. Plan (Wk) Units indicate the Exported Replenishment Orders from the Inventory Plan.

**Exp. Plan (Wk) Date**

The Exp. Plan (Wk) Date indicates the date when the corresponding replenishment orders from the Inventory Plan were exported (following batch run).

**EOP (WK) Units**

The EOP (WK) Units is a calculated measure used to indicate the end-of-period inventory units. In this view, you can review the available inventory units at the end of each week.

**Shortage (Wk) Units**

The Shortage (Wk) Units is a calculated measure used to indicate shortage in units for the product, location, and week combination.

**Sys. Min Level (Wk) Units**

The Sys. Min Level (Wk) Units is a calculated measure used to indicate the minimum target inventory in units that was calculated by the system for the product, location, and week combination.

**Sys. Max Level (Wk) Units**

The Sys. Max Level (Wk) Units is a calculated measure used to indicate the maximum target inventory in units that was calculated by the system for the product, location, and week combination.

**Min Method Change**

The Min Method Change is an editable measure to override the assigned inventory plan method to calculate the System Minimum value at the product, location, and week level. For more details about the possible values check the measure the Min Method in the SKU-LOC view within the Replenishment Parameters workspace.

**Min Fixed Change Units**

The Min Fixed Change Units is an editable measure used to override the minimum quantity to be used when the Fixed method is applied at the product, location, and week level. This value is used in the calculation instead of the 2Min Fixed @ Today Units2, the RUTL @ Today Units or the ROL @ Today Units if the method to calculate the System Minimum value is Fixed.

**Min Fwd Cov. Change Dur (d)**

The Min Fwd Cov. Change Dur (d) is an editable measure used to override the minimum number of days of cover applied to the product, location, and week.

### Max Method Change

The Max Method Change is an editable measure used to override the assigned inventory plan method to calculate the System Maximum value at the product, location, and week level. For more details about the possible values check the measure the Max Method in the SKU-LOC view within the Replenishment Parameters workspace.

### Max Fixed Change Units

The Max Fixed Change Units is an editable measure used to override the maximum quantity to be used when the Fixed method is applied at the product, location, and week level. This value is used in the calculation instead of the Max Fixed @ Today Units if the method to calculate the System Maximum value is Fixed.

### Max Fwd Cov. Change Dur (d)

The Max Fwd Cov. Change Dur (d) is an editable measure used to override the maximum number of days of cover applied to the product, location, and week.

## SKU-Source LOC-WEEK Level (R & A) View

The **SKU-Source LOC-WEEK Level (R & A) View**, under the **Inventory Plan** tab, is similar to the view SKU-LOC-WEEK Level (InvPlan), but allows you to review from the source location perspective rather than the destination location perspective. For more details regarding the measures, refer to the SKU-LOC-WEEK Level (InvPlan) view.

**Figure 21-62 SKU-Source LOC-WEEK Level (R & A) View**

## Rebalancing Step

In this step you can adjust inventory levels to maintain optimal stock levels. Usually this is achieved by moving products from locations with surplus to locations with deficit.



This may also involve increasing orders for items that are selling well or reducing orders for slow-moving items. This step contains these views:

- Summary Tab
  - [Item-Location View](#)
  - [Items View](#)
  - [Locations View](#)
  - [Parameters View](#)
- Transfers Tab
  - [Item-Location View](#)
  - [Items View](#)
  - [Links View](#)
  - [Locations View](#)
  - [Parameters View](#)

## Item-Location View

This **Item-Location View** is located under the **Summary** tab. In this view, you can review the store transfer summary at the item location level.

Figure 21-63 Item-Location View

▼ **Item-Location**

☰ Location ☰ ✎

☰ Measure (Default) ▼ ✎ ?

☰ Product ☰ ✎

◀ 1234582 - Folgers - Break

	Location
Measure	1006 Chicago <span style="font-size: 1.2em;">↕</span>
Product-Location Alerts	<input type="checkbox"/>
Reviewed Product-Location	Short ShortCurrent
Total Available Units	<input type="checkbox"/>
Receipt Up To Level @ Today Units	65
Initial Need Units	294
Final Need Units	
System Transfer In Units	
System Transfer In	
System Transfer Out Units	
System Transfer Out	
Transfers To Be Approved	
Ignore Replenishment Plan To Be Approved	<input type="checkbox"/>
Approved	<input type="checkbox"/>
Approved Transfer In Units	<input type="checkbox"/>
Approved Transfer In	
Approved Transfer Out Units	
Approved Transfer Out	
Approved UserID	
Export Transfer In Units	

### **Item-Location View - Default Profile Measures**

The Default measure profile available in the Item-Location view contains the following measures.

#### **Product-location Alerts**

This measure indicates if an alert was triggered for an item-location.

#### **Reviewed Product-Location**

By using this measure, a user indicates that the system plan has been reviewed

#### **Total Available Units**

This measure displays the total available units at an item-location.

#### **Receipt Up to Level @ Today Units**

This measure displays the Receipt Up To Level units as set up in the Replenishment Parameters workspace.

#### **Initial Need Units**

This measure displays the units needed for an item-location combination.

#### **Final Need Units**

This measure displays the units needed for an item-location after the transfer.

#### **System Transfer in Units**

This measure displays the number of units to be transferred in calculated by the system.

#### **System Transfer In**

This measure displays the list of source locations after rebalancing is calculated by the system.

#### **System Transfer Out Units**

This measure displays the number of units to be transferred out calculated by the system.

#### **System Transfer Out**

This measure displays the list of destination locations after rebalancing is calculated by the system.

#### **Transfers To Be Approved**

This measure is used to approve the transfers.

#### **Ignore Replenishment Plan to Be Approved**

This measure allows you to approve rebalancing without approving the replenishment system plan.

#### **Approved**

This measure allows the user to approve the rebalancing transfers.

#### **Approved Transfer in Units**

This measure displays the approved number of units to be transferred in for an item-location.

#### **Approved Transfer In**

This measure displays the list of source locations after rebalancing is approved.

**Approved Transfer Out Units**

This measure displays the approved number of units to be transferred out for an item-location.

**Approved Transfer Out**

This measure displays the list of destination locations after rebalancing is approved.

**Approved UserID**

This measure displays the user ID of the user who approved the transfers.

**Export Transfer in Units**

This measure displays the exported number of units of the destination location after the batch is run.

**Export Transfer In**

This measure displays the list of source locations after the batch is run.

**Export Transfer Out Units**

This measure displays the list of destination locations after the batch is run.

**Export Transfer Out**

This measure displays the exported number of units of the source location after the batch is run.

**Total Deficit Units**

This measure displays the total deficit units for an item-location combination.

**Total Deficit %**

This measure displays the percentage deficit relative to the total units needed for an item-location combination.

**Total Surplus Units**

This measure displays the total surplus units for an item-location combination.

**Total Surplus %**

This measure displays the percentage surplus relative to the total units needed for an item-location combination.

**In Transit over Lead Time+Review Time Units**

This measure displays the units in transit over lead and review time for an item-location.

**On Order (In) over Lead Time+Review Time Units**

This measure displays the units on order over lead and review time for an item-location.

## Items View

This **Items View** is located under the **Summary** tab. In this view, you can review the change in KPIs, such as lost sales, as a result of the transfers, with the focus on products.

Figure 21-64 Items View

Source Mask	<input checked="" type="checkbox"/>
Destination Mask	<input checked="" type="checkbox"/>
Item Mask	<input type="checkbox"/>
Unit Price €	0.00
Availability Units	11,000
Approved Transfer In Units	
Approved Transfer Out Units	
Initial Availability Units	
Receipt Up To Level Units	13,355
System Transfer In Units	
System Transfer In €	0.00
System Transfer Out Units	
Approved	<input type="checkbox"/>
Approved UserID	
Approved Date	
Final Availability Units	
Initial Need Units	
Final Need Units	%
Final Need %	
Initial Surplus Units	
Final Surplus Units	%

### **Items View - Default Profile Measures**

The Default measure profile available in the Items view contains the following measures.

#### **Source Mask**

This measure is used to decide which products can be transferred out.

#### **Destination Mask**

This measure is used to decide which products can be transferred in.

#### **Item Mask**

This measure displays if an item is eligible for transfer.

#### **Unit Price**

This measure displays the unit price.

#### **Available Units**

This measure displays the available units considering replenishment, manual transfers, and rebalancing.

#### **Approved Transfer in Units**

This measure displays the approved number of units to be transferred in.

#### **Approved Transfer Out Units**

This measure displays the approved number of units to be transferred out for an item-location.

#### **Initial Availability Units**

This measure displays the available number of units in the destination location before rebalancing.

#### **Receipt Up to Level Units**

This measure displays the Receipt Up To Level units as set up in the Replenishment Parameters workspace

#### **System Transfer in Units**

This measure displays the number of units to be transferred in calculated by the system.

#### **System Transfer In**

This measure displays the list of source locations after rebalancing as calculated by the system.

#### **System Transfer Out Units**

This measure displays the number of units to be transferred out calculated by the system.

#### **Approved**

This measure allows the user to approve the rebalancing transfers.

#### **Approved UserID**

This measure displays the user ID of the user who approved the transfers.

#### **Approved Date**

This measure displays the date of the approval of transfers.

**Final Availability Units**

This measure displays the available number of units in the destination location after rebalancing.

**Initial Need Units**

This measure displays the units needed for a product.

**Final Need Units**

This measure displays the units needed for a product after the transfer.

**Final Need %**

This measure displays the percentage of the need after rebalancing relative to the need before rebalancing.

**Initial Surplus Units**

This measure displays the initial surplus units for a product.

**Final Surplus Units**

This measure displays the surplus units for a product after the transfers.

**Final Surplus %**

This measure displays the percentage surplus after rebalancing relative to the surplus before rebalancing. This measure displays the percentage surplus after the transfer relative to the total units needed.

**Forecast Daily Rate of Sale Units**

This measure displays the forecasted daily rate of sales in units.

**Initial DOS Duration (Days)**

This measure displays the initial days of supply based on the forecast.

**Final DOS Duration (Days)**

This measure displays the days of supply after the transfers.

**Initial DOS MAD Duration (Days)**

This measure displays the mean absolute deviation of the days of stock before rebalancing.

**Final DOS MAD Duration (Days)**

This measure displays the mean absolute deviation of the days of stock before rebalancing.

**Final DOS MAD %**

This measure displays the mean absolute deviation of the days of stock after rebalancing relative to the mean absolute deviation of the days of stock before rebalancing.

**Initial Lost Sales Units**

This measure displays the initial lost sales units for a product calculated based on deficit units.

**Final Lost Sales Units**

This measure displays the lost sales units for a product calculated based on deficit units after the transfers.

**Initial Lost Sales \$**

This measure displays the initial lost sales value for a product calculated based on deficit units.

**Final Lost Sales \$**

This measure displays the lost sales value for a product calculated based on deficit units after the transfers.

**Final Lost Sales %**

This measure displays the percentage lost sales relative to the total units needed.

**System Additional Sales \$**

## Locations View

This **Locations View** is located under the **Summary tab**. In this view, you can review the change in KPIs, such as lost sales, as a result of the transfers, with the focus on locations.



Figure 21-65 Locations View

Source Mask	<input checked="" type="checkbox"/>
Destination Mask	<input checked="" type="checkbox"/>
Location Mask	<input type="checkbox"/>
Availability Units	
Approved Transfer In Units	
Approved Transfer Out Units	
Initial Availability Units	
Receipt Up To Level Units	24,884
System Transfer In Units	
System Transfer In €	0.00
System Transfer Out Units	
Approved	<input type="checkbox"/>
Approved UserID	
Approved Date	
Final Availability Units	
Initial Need Units	
Final Need Units	
Final Need %	%
Initial Surplus Units	
Final Surplus Units	
Final Surplus %	%
Forecast Daily Rate Of Sale Units	

### **Locations View - Default Profile Measures**

The Default measure profile available in the Locations view contains the following measures.

#### **Source Mask**

This measure is used to decide which stores can transfer products out.

#### **Destination Mask**

This measure is used to decide which stores can have products transferred in.

#### **Location Mask**

This measure displays if a store is eligible for stock rebalancing.

#### **Availability Units**

This measure displays the available units considering replenishment, manual transfers, and rebalancing.

#### **Approved Transfer in Units**

This measure displays the approved number of units to be transferred in for a location.

#### **Approved Transfer Out Units**

This measure displays the approved number of units to be transferred out from a location.

#### **Initial Availability Units**

This measure displays the available number of units in the destination location before rebalancing.

#### **Receipt Up to Level Units**

This measure displays the Receipt Up To Level units as set up in the Replenishment Parameters workspace.

#### **System Transfer in Units**

This measure displays the number of units to be transferred into a location calculated by the system.

#### **System Transfer In \$**

This measure displays the value of products be transferred into a location calculated by the system.

#### **System Transfer Out Units**

This measure displays the number of units to be transferred out of a location calculated by the system.

#### **Approved**

This measure allows the user to approve the rebalancing transfers.

#### **Approved UserID**

This measure displays the user ID of the user who approved the transfers.

#### **Approved Date**

This measure displays the date of the approval of transfers.

**Final Availability Units**

This measure displays the available number of units in the destination location after rebalancing.

**Initial Need Units**

This measure displays the units needed for a location.

**Final Need Units**

This measure displays the units needed for a location after the transfers.

**Final Need %**

This measure displays the percentage of the need after rebalancing relative to the need before rebalancing.

**Initial Surplus Units**

This measure displays the initial surplus units at a location.

**Final Surplus Units**

This measure displays the initial surplus units at a location.

**.Final Surplus %**

This measure displays the percentage surplus after the transfer relative to the total units needed at a location.

**Forecast Daily Rate of Sale Units**

This measure displays the forecasted daily rate of sales in units at a location.

**Initial DOS Duration (Days)**

This measure displays the initial days of supply based on the forecast.

**Final DOS Duration (Days)**

This measure displays the initial days of supply based on the forecast.

**Initial Lost Sales Units**

This measure displays the initial lost sales units at a location calculated based on deficit units.

**Final Lost Sales Units**

This measure displays the initial lost sales units at a location calculated based on deficit units after the transfers.

**Initial Lost Sales \$**

This measure displays the initial lost sales value at a location calculated based on deficit units.

**Final Lost Sales \$**

This measure displays the initial lost sales value at a location calculated based on deficit units after the transfers.

**Final Lost Sales %**

This measure displays the lost sales at a location calculated based on deficit units after the transfers relative to the total need at the location.

**System Additional Sales \$**

This measure displays the difference between lost sales before and after rebalancing.

## Parameters View

This **Parameters View** is located under the **Summary tab**. In this view, you can review the parameters that are setup for the store transfers.

**Figure 21-66 Parameters View**

Parameters	
Measure	
Rebalancing Type	Need/Surplus ▾
Surplus Above Layer	Layer 5 ▾
Post Optimization	<input checked="" type="checkbox"/>
Destination Sorting Key 1	Layer ▾
Destination Sorting Key 2	Priority ▾
Destination Sorting Key 3	Layer Perc ▾
Destination Sorting Key 4	Coverage ▾
Source Sorting Key 1	Cost ▾
Source Sorting Key 2	Lead Time ▾
Source Sorting Key 3	User Out ▾
Source Sorting Key 4	Priority ▾
Source Sorting Key 5	Surplus ▾

### Parameters View - Default Profile Measures

The Default measure profile available in the Parameters view contains the following measures.

#### Rebalancing Type

Use this measure to select how the stock is rebalanced:

- **Need/Surplus** - looks at the deficit need of the destination location and surplus at the source location.
- **DOS** - tries to balance the Days of Stock (DOS) at every location.
- **Need/Surplus+DOS** - tries to balance the need/surplus and after it runs the DOS balancing.

#### **Surplus Above Layer**

This measure allows you to select what portion of stock is considered surplus. For instance, if you select Layer 3, the surplus units include all units that are in Layers 4 and 5. Units in the Layers 3 and less can not be transferred.

#### **Post Optimization**

This measure allows you to determine if optimization should run during rebalancing when the rebalancing type is **Need/Surplus+DOS**.

#### **Destination Sorting Key 1**

#### **Destination Sorting Key 2**

#### **Destination Sorting Key 3**

#### **Destination Sorting Key 4**

In the Destination Sorting Key measures, you can specify the sorting attributes for destinations. Key 1 has the highest priority and the measures decrease in priority from Key 1 to Key 4. The attributes can be:

- **Layer** - The destination location is sorted based on demand layer priority (Customer Order, Display, Minimum Credible Quantity, Reorder Point, Reorder Up To Level).
- **Priority** - User defined priority in the transfer link.
- **Layer percentage** - Fill rate percentage on the demand layer.
- **Coverage** - Days Of Stock.

#### **Source Sorting Key 1**

#### **Source Sorting Key 2**

#### **Source Sorting Key 3**

#### **Source Sorting Key 4**

In the Source Sorting Key measures, you can specify the sorting attributes for source locations. Key 1 has the highest priority and the measures decrease in priority from Key 1 to Key 4. The attributes can be:

- **Cost** - Prioritizes the lowest cost.
- **Lead time** - Prioritizes the fastest lead time.
- **User Out** - User defined Transfer Out.
- **Priority** - User defined priority in the transfer link.
- **Surplus** - Prioritizes the highest surplus.

## Item-Location View

This **Item-Location View** is located under the **Transfers tab**. In this view, you can set up the store transfers at the item location level.

**Figure 21-67 Item-Location View**

Measure	
User Filter Product-Location	<input type="checkbox"/>
Product-Location Alerts	hortCurrent
Reviewed Product-Location	<input type="checkbox"/>
Total Available Units	65
Receipt Up To Level @ Today Units	294
Initial Need Units	
Final Need Units	
System Transfer In Units	
System Transfer In	
System Transfer Out Units	
System Transfer Out	
Transfers To Be Approved	<input type="checkbox"/>
Ignore Replenishment Plan To Be Approved	<input type="checkbox"/>
Approved	<input type="checkbox"/>
Approved Transfer In Units	
Approved Transfer In	
Approved Transfer Out Units	
Approved Transfer Out	
Approved UserID	

### **Item-Location View - Default Profile Measures**

The Default measure profile available in the Item-Location view contains the following measures.

#### **User Filter Product-Location**

#### **Product-Location Alerts**

This measure indicates if an alert was triggered for an item-location.

#### **Reviewed Product-Location**

#### **Total Available Units**

This measure displays the total available units at an item-location.

#### **Receipt Up to Level @ Today Units**

#### **Initial Need Units**

This measure displays the units needed for an item-location combination.

#### **Final Need Units**

This measure displays the units needed for an item-location after the transfer.

#### **System Transfer in Units**

This measure displays the number of units to be transferred in calculated by the system.

#### **System Transfer In**

#### **System Transfer Out Units**

This measure displays the number of units to be transferred out calculated by the system.

#### **System Transfer Out**

#### **Transfers To Be Approved**

This measure is used to approve the transfers.

#### **Ignore Replenishment Plan to Be Approved**

#### **Approved**

This measure allows you to approve the rebalancing transfers.

#### **Approved Transfer in Units**

This measure displays the approved number of units to be transferred in for an item-location.

#### **Approved Transfer In**

This measure displays the list of source locations after rebalancing is approved.

#### **Approved Transfer Out Units**

This measure displays the approved number of units to be transferred out for an item-location.

**Approved Transfer Out****Approved UserID**

This measure displays the user ID of the user who approved the transfers.

**Export Transfer in Units**

This measure displays the exported number of units of the destination location after the batch is run.

**Export Transfer In**

This measure displays the list of source locations after the batch is run.

**Export Transfer Out Units**

This measure displays the exported number of units of the source location after the batch is run.

**Export Transfer Out**

This measure displays the list of destination locations after the batch is run.

**Total Deficit Units**

This measure displays the total deficit units for an item-location.

**Total Deficit %**

This measure displays the percentage deficit relative to the total units needed for an item-location.

**Total Surplus Units**

This measure displays the total surplus units for an item-location.

**Total Surplus %**

This measure displays the percentage surplus relative to the total units needed for an item-location.

**In Transit over Lead Time+Review Time Units**

This measure displays the units in transit over lead and review time for an item-location.

**On Order (In) over Lead Time+Review Time Units**

This measure displays the units on order over lead and review time for an item-location.

## Items View

This **Items View** is located under the **Transfers tab**. In this view, you can review the change in KPIs, such as lost sales, as a result of the transfers, with the focus on products.



Figure 21-68 Items View

Source Mask	<input checked="" type="checkbox"/>
Destination Mask	<input checked="" type="checkbox"/>
Item Mask	<input type="checkbox"/>
Unit Price €	0.00
Availability Units	11,000
Approved Transfer In Units	
Approved Transfer Out Units	
Initial Availability Units	
Receipt Up To Level Units	13,355
System Transfer In Units	
System Transfer In €	0.00
System Transfer Out Units	
Approved	<input type="checkbox"/>
Approved UserID	
Approved Date	
Final Availability Units	
Initial Need Units	%
Final Need Units	
Final Need %	
Initial Surplus Units	%

**Items View - Default Profile Measures**

The Default measure profile available in the Items view contains the following measures.

**Source Mask**

This measure is used to decide which products can be transferred out.

**Destination Mask**

This measure is used to decide which products can be transferred in.

**Item Mask**

This measure displays if an item is eligible for transfer.

**Unit Price \$**

This measure displays the unit price.

**Availability Units**

This measure displays the available units considering replenishment, manual transfers, and rebalancing.

**Approved Transfer in Units**

This measure displays the approved number of units to be transferred in.

**Approved Transfer Out Units**

This measure displays the approved number of units to be transferred out for an item-location.

**Initial Availability Units**

This measure displays the available number of units in the destination location before rebalancing.

**Receipt Up to Level Units**

This measure displays the Receipt Up To Level units as set up in the Replenishment Parameters workspace.

**System Transfer in Units**

This measure displays the number of units to be transferred in calculated by the system.

**System Transfer In \$**

This measure displays the value of the units transferred in for a product.

**System Transfer Out Units**

This measure displays the number of units to be transferred out calculated by the system.

**Approved**

This measure allows you to approve the rebalancing transfers.

**Approved UserID**

This measure displays the user ID of the user who approved the transfers.

**Approved Date**

This measure displays the date of the approval of transfers.

**Final Availability Units**

This measure displays the available number of units in the destination location after rebalancing.

**Initial Need Units**

This measure displays the units needed for a product.

**Final Need Units**

This measure displays the units needed for a product after the transfer.

**Final Need %**

This measure displays the percentage of the need after rebalancing relative to the need before rebalancing.

**Initial Surplus Units**

This measure displays the initial surplus units for a product.

**Final Surplus Units**

This measure displays the surplus units for a product after the transfers.

**Final Surplus %**

This measure displays the percentage of surplus units relative to the total need.

**Forecast Daily Rate of Sale Units**

This measure displays the forecasted daily rate of sales in units.

**Initial DOS Duration (Days)**

This measure displays the initial days of supply based on the forecast.

**Final DOS Duration (Days)**

This measure displays the days of supply after the transfers.

**Initial DOS MAD Duration (Days)**

This measure displays the mean absolute deviation of the days of stock before rebalancing.

**Final DOS MAD Duration (Days)**

This measure displays the mean absolute deviation of the days of stock after rebalancing.

**Final DOS MAD %**

This measure displays the mean absolute deviation of the days of stock after rebalancing relative to the mean absolute deviation of the days of stock before rebalancing.

**Initial Lost Sales Units**

This measure displays the initial lost sales units for a product calculated based on deficit units.

**Final Lost Sales Units**

This measure displays the lost sales units for a product calculated based on deficit units after the transfers.

**Initial Lost Sales \$**

This measure displays the initial lost sales value for a product calculated based on deficit units.

**Final Lost Sales \$**

This measure displays the lost sales value for a product calculated based on deficit units after the transfers.

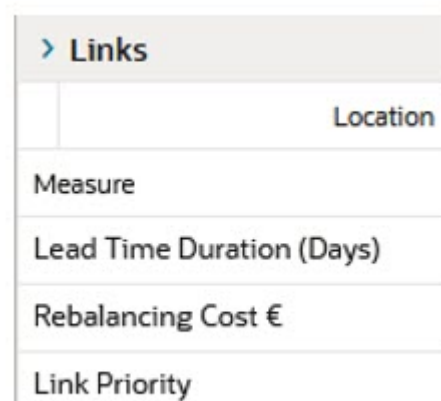
**Final Lost Sales %**

This measure displays the percentage lost sales relative to the total units needed.

## Links View

This **Links View** is located under the **Transfers tab**. In this view, you can manage metrics that define relationships between source and destination locations.

**Figure 21-69 Links View**



> Links	
	Location
Measure	
Lead Time Duration (Days)	
Rebalancing Cost €	
Link Priority	

**Links View - Default Profile Measures**

The Default measure profile available in the Links view contains the following measures.

**Lead Time Duration (Days)**

Use this measure to enter the transfer duration from source to destination.

**Rebalancing Cost \$**

Use this measure to enter the transfer cost from source to destination.

**Link Priority**

Use this measure to enter the routing transfer priority

## Locations View

This **Locations View** is located under the **Transfers tab**. In this view, you can review the change in KPIs, such as lost sales, as a result of the transfers, with the focus on locations.

Figure 21-70 Locations View

Measure	
Source Mask	<input checked="" type="checkbox"/>
Destination Mask	<input checked="" type="checkbox"/>
Location Mask	<input type="checkbox"/>
Availability Units	
Approved Transfer In Units	
Approved Transfer Out Units	
Initial Availability Units	
Receipt Up To Level Units	24,884
System Transfer In Units	
	0.00
System Transfer In €	<input type="checkbox"/>
System Transfer Out Units	
Approved	
Approved UserID	
Approved Date	
Final Availability Units	
Initial Need Units	%
Final Need Units	
Final Need %	
Initial Surplus Units	%
Final Surplus Units	

#### Locations View - Default Profile Measures

The Default measure profile available in the Locations view contains the following measures.

##### Source Mask

This measure is used to decide which stores can transfer products out.

**Destination Mask**

This measure is used to decide which stores can have products transferred in.

**Location Mask**

This measure displays if a store is eligible for stock rebalancing.

**Availability Units**

This measure displays the available units considering replenishment, manual transfers, and rebalancing.

**Approved Transfer in Units**

This measure displays the approved number of units to be transferred in for a location.

**Approved Transfer Out Units**

This measure displays the approved number of units to be transferred out from a location.

**Initial Availability Units**

This measure displays the available number of units in the destination location before rebalancing.

**Receipt Up to Level Units**

This measure displays the Receipt Up To Level units as set up in the Replenishment Parameters workspace.

**System Transfer in Units**

This measure displays the number of units to be transferred into a location calculated by the system.

**System Transfer In \$**

This measure displays the value of products be transferred into a location calculated by the system.

**System Transfer Out Units**

This measure displays the number of units to be transferred out of a location calculated by the system.

**Approved**

This measure allows you to approve the rebalancing transfers.

**Approved UserID**

This measure displays the user ID of the user who approved the transfers.

**Approved Date**

This measure displays the date of the approval of transfers.

**Final Availability Units**

This measure displays the available number of units in the destination location after rebalancing.

**Initial Need Units**

This measure displays the units needed for a location.

**Final Need Units**

This measure displays the units needed for a location after the transfers.

**Final Need %**

This measure displays the percentage of the need after rebalancing relative to the need before rebalancing.

**Initial Surplus Units**

This measure displays the initial surplus units at a location.

**Final Surplus Units**

This measure displays the initial surplus units at a location.

**Final Surplus %**

This measure displays the percentage surplus after the transfer relative to the total units needed at a location.

**Forecast Daily Rate of Sale Units**

This measure displays the forecasted daily rate of sales in units at a location.

**Initial DOS Duration (Days)**

This measure displays the initial days of supply based on the forecast.

**Final DOS Duration (Days)**

This measure displays the initial days of supply based on the forecast.

**Initial Lost Sales Units**

This measure displays the initial lost sales units at a location calculated based on deficit units.

**Final Lost Sales Units**

This measure displays the lost sales units at a location calculated based on deficit units after the transfers.

**Initial Lost Sales \$**

This measure displays the initial lost sales value at a location calculated based on deficit units.

**Final Lost Sales \$**

This measure displays the lost sales value at a location calculated based on deficit units after the transfers.

**Final Lost Sales %**

This measure displays the lost sales at a location calculated based on deficit units after the transfers relative to the total need at the location.

## Parameters View

This **Parameters View** is located under the **Transfers tab**. In this view, you can set the parameters that are used during rebalancing process.

Figure 21-71 Parameters View

Parameters	
Measure	
Rebalancing Type	Need/Surplus ▾
Surplus Above Layer	Layer 5 ▾
Post Optimization	<input checked="" type="checkbox"/>
Destination Sorting Key 1	Layer ▾
Destination Sorting Key 2	Priority ▾
Destination Sorting Key 3	Layer Perc ▾
Destination Sorting Key 4	Coverage ▾
Source Sorting Key 1	Cost ▾
Source Sorting Key 2	Lead Time ▾
Source Sorting Key 3	User Out ▾
Source Sorting Key 4	Priority ▾
Source Sorting Key 5	Surplus ▾

### Parameters View - Default Profile Measures

The Default measure profile available in the Parameters view contains the following measures.

#### Rebalancing Type

Use this measure to select how the stock is rebalanced:

- **Need/Surplus** - looks at the deficit need of the destination location and surplus at the source location.
- **DOS** - tries to balance the Days of Stock (DOS) at every location.
- **Need/Surplus+DOS** - tries to balance the need/surplus and after it runs the DOS balancing.

#### Surplus Above Layer

This measure allows you to select what portion of stock is considered surplus. For instance, if you select Layer 3, the surplus units include all units that are in Layers 4 and 5. Units in the Layers 3 and less can not be transferred.

#### Post Optimization



This measure allows you to determine if optimization should run during rebalancing when the rebalancing type is **Need/Surplus+DOS**.

#### **Destination Sorting Key 1**

#### **Destination Sorting Key 2**

#### **Destination Sorting Key 3**

#### **Destination Sorting Key 4**

In the Destination Sorting Key measures, you can specify the sorting attributes for destinations. Key 1 has the highest priority and the measures decrease in priority from Key 1 to Key 4. The attributes can be:

- **Layer** - The destination location is sorted based on demand layer priority (Customer Order, Display, Minimum Credible Quantity, Reorder Point, Reorder Up To Level).
- **Priority** - User defined priority in the transfer link.
- **Layer percentage** - Fill rate percentage on the demand layer.
- **Coverage** - Days Of Stock.

#### **Source Sorting Key 1**

#### **Source Sorting Key 2**

#### **Source Sorting Key 3**

#### **Source Sorting Key 4**

In the Source Sorting Key measures, you can specify the sorting attributes for source locations. Key 1 has the highest priority and the measures decrease in priority from Key 1 to Key 4. The attributes can be:

- **Cost** - Prioritizes the lowest cost.
- **Lead time** - Prioritizes the fastest lead time.
- **User Out** - User defined Transfer Out.
- **Priority** - User defined priority in the transfer link.
- **Surplus** - Prioritizes the highest surplus.

#### **Rebalancing Action Buttons**

This view includes these action buttons:

- **Calculate Rebalancing**  
This action button initiates the rebalancing calculations.
- **Clear Rebalancing**  
This action button resets the numbers generated by the Calculate Rebalancing action.
- **Approve**  
This action button approves the store transfers calculated by clicking the Calculate Rebalancing action.
- **Undo Approve**  
This action button clears the Approved measure, and the approved transfers measures

# Plan Transfer Step

In this step, you can identify deficit and surplus inventory across locations and plan inventory transfers between locations when necessary/required. This step contains these views:

- [Allowed Transfer View](#)
- [Transfer Deficit Analysis View](#)
- [Transfer Surplus Analysis View](#)
- [Transfer by Destination View](#)
- [Transfer by Product View](#)
- [Transfer Deficit From-To View](#)
- [Transfer Surplus From-To View](#)

## Allowed Transfer View

The **Allowed Transfer View**, under the **Allowed Transfer tab**, shows you what locations are allowed to have transfers. You can manage a location matrix using the Manage Allowed Transfer workspace under the Administration activity where you can select if a transfer between the locations in the matrix is allowed or not. The columns in the worksheet represent the transfers' destination location and the rows represent the transfers' source location.

**Figure 21-72 Allowed Transfer View**

The screenshot displays the 'Allowed Transfer' view in a software application. It features a grid where the rows represent source locations and the columns represent destination locations. Each cell in the grid contains a checkbox, indicating whether a transfer is allowed between those two locations. The interface includes a menu bar at the top with options like 'Manual Transfer', 'Allowed Transfer', 'Deficit Surplus Analysis', and 'Manual Transfer'. Below the menu, there are filters and a toolbar with buttons such as 'Calculate (F9)', 'Calculate Transfer Plan', 'Approve Transfers', 'Clear Transfers', 'Within Day Exp. Refresh', 'Run Filters', 'Clear Filters', and 'Commit (F8)'. The main grid shows a list of locations on the left, including 'all [Location]', '1000 Charlotte', '1001 Atlanta', '1002 Dallas', '1003 Boston', '1004 New York', '1005 Philadelphia', '1006 Chicago', '1007 Minneapolis', '1008 St. Louis', '1009 Albuquerque', '1010 Los Angeles', '1011 Seattle', '1014 Portland', and '1015 Boise'. The columns correspond to these same locations, with the first column being the source location and the others being destination locations.

### Allowed Transfer View - Default Profile Measures

The Default measure profile available in the Allowed Transfer view contains the following measure.

#### Transfer Enable

The Transfer Enable allows or disallows transfers between source locations and destination locations. When selected, transfers are allowed. When clear, transfers are not allowed. The

Transfer Enable measure can be edited and managed using the Manage Allowed Transfer workspace under the Administration activity.

## Transfer Deficit Analysis View

The **Transfer Deficit Analysis View**, under the **Deficit Surplus Analysis** tab, allows you to review what stores and products have an inventory deficit. This provides you with the necessary information to support planning of transfers between locations to balance the inventory levels across the locations.

**Figure 21-73 Transfer Deficit Analysis View**

	1000 Web	1005 Philadelphia	1074 Pittsburgh	1075 Newark Outlet	1076 Baltimore	1077 Richmond	1078 Washington	1084 Norfolk	1085 Virginia Beach	1113 Raleigh	1164 New Castle
	Tot. Deficit Units	Tot. Deficit Units	Tot. Deficit Units	Tot. Deficit Units	Tot. Deficit Units	Tot. Deficit Units	Tot. Deficit Units	Tot. Deficit Units	Tot. Deficit Units	Tot. Deficit Units	Tot. Deficit Units
2000001 - KTS Low "Home"	85	53	75	75	59	74	56	53	53	69	74
2000002 - KTS Low "Home"	72	63	52	68	52	68	52	57	52	63	62
2000003 - KTS Low "Home"	56	59	74	74	63	63	61	68	74	53	64
2000004 - "Independence Day"											
2000005 - "Independence Day"											
2000006 - "Independence Day"	1	1	2	1	1		1	1	1	1	1
2000007 - "Have Fun in LA"											
2000008 - "Have Fun in LA"											
2000009 - "Have Fun in LA"											
2000010 - 2020 Summer											
2000011 - 2020 Summer											
2000012 - 2020 Summer											
2000013 - "Have Fun" 2020	11	8	9	9	10	11	11	8	11	9	11
2000014 - "Have Fun" 2020	8	12	12	8	8	8	9	10	12	12	10

### Transfer Deficit Analysis View - Default Profile Measures

The Default measure profile available in the Transfer Deficit Analysis view contains the following measure.

#### Tot. Deficit Units

The Tot. Deficit Units is a calculated measure used to indicate the amount of deficit units for the product and location combination. The values are calculated based on the RUTL calculated at the system date and the available inventory. When the available inventory is not enough for the RUTL then there is a deficit.

## Transfer Surplus Analysis View

The **Transfer Surplus Analysis View**, under the **Deficit Surplus Analysis** tab, allows you to review what stores and products have an inventory excess/surplus. This provides you with the necessary information to support planning of transfers between locations to balance the inventory levels across the locations.

Figure 21-74 Transfer Surplus Analysis View

	1000 Web		1005 Philadelphia Outlet		1074 Pittsburgh Outlet		1075 Newark Outlet		1076 Baltimore		1077 Richmond	
	Tot. Surplus Units	PROD SLOC Man. Filter	Tot. Surplus Units	PROD SLOC Man. Filter	Tot. Surplus Units	PROD SLOC Man. Filter	Tot. Surplus Units	PROD SLOC Man. Filter	Tot. Surplus Units	PROD SLOC Man. Filter	Tot. Surplus Units	PROD SLOC Man. Filter
2000001 - KTS Low "Home"		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
2000002 - KTS Low "Home"		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
2000003 - KTS Low "Home"		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
2000004 - "Independence Day"		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	2	<input type="checkbox"/>	2	<input type="checkbox"/>	11	<input type="checkbox"/>
2000005 - "Independence Day"		<input type="checkbox"/>	6	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	1	<input type="checkbox"/>		<input type="checkbox"/>
2000006 - "Independence Day"		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	2	<input type="checkbox"/>
2000007 - "Have Fun in LA"	1	<input type="checkbox"/>		<input type="checkbox"/>	6	<input type="checkbox"/>	5	<input type="checkbox"/>		<input type="checkbox"/>	3	<input type="checkbox"/>
2000008 - "Have Fun in LA"	2	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	5	<input type="checkbox"/>		<input type="checkbox"/>	5	<input type="checkbox"/>
2000009 - "Have Fun in LA"		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	5	<input type="checkbox"/>		<input type="checkbox"/>	1	<input type="checkbox"/>
2000010 - 2020 Summer	3	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	2	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
2000011 - 2020 Summer	2	<input type="checkbox"/>		<input type="checkbox"/>	1	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
2000012 - 2020 Summer		<input type="checkbox"/>	4	<input type="checkbox"/>	4	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
2000013 - "Have Fun" 2020		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
2000014 - "Have Fun" 2020		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>

### Transfer Surplus Analysis View - Default Profile Measures

The Default measure profile available in the Transfer Surplus Analysis view contains the following measures.

#### Tot. Surplus Units

The Tot. Surplus Units is a calculated measure used to indicate the number of surplus units for the product and location combination. The values are calculated based on the RUTL calculated at the system date and the available inventory. When there is more available inventory than necessary to fulfill the RUTL then there is a surplus.

#### PROD SLOC Man. Filter

The PROD SLOC Man. Filter is an editable measure used to apply a filter to the Transfer Surplus From-To view by the selected product and source location combination. When a product and location combination is selected and after the workspace calculation (either **Calculate** or **F9**) is run, the views are filtered based on the selected product and location combinations.

## Transfer by Destination View

The Transfer by **Destination View**, under the **Manual Transfer** tab, allows you to review replenishment and transfers from a destination location perspective. This view provides approved and exported replenishment and transfers to support the review. Inventory information is also available.

Figure 21-75 Transfer by Destination View

	Appr. Rpl. Plan In Units	Exp. Rpl. Plan In Units	Appr. Transfer In Units	Exp. Transfer Plan In Units	Tot. On Order (in) Units	Appr. Rpl. Plan Out Units	Exp. Rpl. Plan Out Units	Appr. Transfer Out Units	Exp. Transfer Plan Out Units	Tot. On Order (out) Units	Tot. Avail. Units
2000001 - KTS Low "Home"											17
2000002 - KTS Low "Home"											16
2000003 - KTS Low "Home"											12
2000004 - "Independence Day"											12
2000005 - "Independence Day"											15
2000006 - "Independence Day"											11
2000007 - "Have Fun in LA"											10
2000008 - "Have Fun in LA"											11
2000009 - "Have Fun in LA"											8
2000010 - 2020 Summer											12
2000011 - 2020 Summer											8
2000012 - 2020 Summer											12
2000013 - "Have Fun" 2020											39
2000014 - "Have Fun" 2020											23
100000010 - Monarch's Canvas											

### Transfer by Destination View - Default Profile Measures

The Default measure profile available in the Transfer by Destination view contains the following measures.

#### Appr. Rpl. Plan In Units

The Appr. Rpl. Plan In Units is the same as the one in the default profile under the SKU-LOC Level (R & A) view. Refer to the measure, Appr. Rpl. Plan In Units under the SKU-LOC Level (R & A) view, in the Default Profile Measures.

#### Exp. Rpl. Plan In Units

The Exp. Rpl. Plan In Units is the same as the one in the availability profile under the SKU-LOC Level (R & A) view. Refer to the measure, Exp. Rpl. Plan In Units, in the Measures: Availability Profile under the SKU-LOC Level (R & A) view in the Default Profile Measures.

#### Appr. Transfer In Units

The Appr. Transfer In Units is a calculated measure used to indicate the transfer units approved for the product and destination location combination.

#### Exp. Transfer Plan In Units

The Exp. Transfer Plan In Units is a calculated measure used to indicate the transfer units to be exported from the batch for the product and location combination. In this view, the value is the total of all destination locations for the product.

#### Tot. On Order (in) Units

The Tot. On Order (in) Units is the same as the one in the inventory profile under the SKU-LOC Level (R & A) view. Refer to the measure, Tot. On Order (in) Units, in the Measures: Inventory Profile under the SKU-LOC Level (R & A) view in the Default Profile Measures.

#### Appr. Rpl. Plan Out Units

The Appr. Rpl. Plan Out Units is the same as the one in the availability profile under the SKU-LOC Level (R & A) view. Refer to the measure, Appr. Rpl. Plan Out Units, in the Measures: Availability Profile under the SKU-LOC Level (R & A) view in the Default Profile Measures.

#### Exp. Rpl. Plan Out Units

The Exp. Rpl. Plan Out Units is the same as the one in the availability profile under the SKU-LOC Level (R & A) view. Refer to the measure, Exp. Rpl. Plan Out Units, in the Measures: Availability Profile under the SKU-LOC Level (R & A) view in the Default Profile Measures.

#### **Appr. Transfer Out Units**

The Appr. Transfer Out Units is a calculated measure used to indicate the source location's transfer units approved for the product and location combination.

#### **Exp. Transfer Plan Out Units**

The Exp. Transfer Plan Out Units is a calculated measure used to indicate the source location's transfer units to be exported from the batch for the product and location combination. In this view, the value is the total of all locations for the product.

#### **Tot. On Order (out) Units**

The Tot. On Order (out) Units is the same as the one in the inventory profile under the SKU-LOC Level (R & A) view. Refer to the measure, Tot. On Order (out) Units, in the Measures: Inventory Profile under the SKU-LOC Level (R & A) view in the Default Profile Measures.

#### **Tot. Avail. Units**

The Tot. Avail. Units is the same as the one in the default profile under the SKU-LOC Level (R & A) view. Refer to the measure, Tot. Avail. Units, in the Default Profile Measures under the SKU-LOC Level (R & A) view in the Default Profile Measures.

#### **Tot. Avail. Dur (w)**

The Tot. Avail. Dur (w) is a calculated measure used to indicate the number of weeks that the Tot. Avail. Unit can cover the demand for the product and location combination.

#### **RUTL @ Today Units**

The RUTL @ Today Units is the same as the one in the default profile under the SKU-LOC Level (R & A) view. Refer to the measure, RUTL @ Today Units, in the Default Profile Measures under the SKU-LOC Level (R & A) view in the Default Profile Measures.

#### **Tot. Deficit Units**

The Tot. Deficit Units is the same as the one in the default profile under the Transfer Deficit Analysis view. Refer to the measure, Tot. Deficit Units, in the Default Profile Measures under the Transfer Deficit Analysis view in the Default Profile Measures.

#### **Tot. Surplus Units**

The Tot. Surplus Units is the same as the one in the default profile under the Transfer Surplus Analysis view. Refer to the measure, Tot. Surplus Units, in the Default Profile Measures under the Transfer Surplus Analysis view, for more details.

#### **Transfer Plan In Units**

The Transfer Plan In Units is a calculated measure used to indicate the transfer units planned for the product and destination location combination (for example, populated when a deficit location has a transfer planned to receive inventory from another location).

#### **Transfer Plan Out Units**

The Transfer Plan Out Units is a calculated measure used to indicate the transfer units planned for the product and source location combination (for example, populated when a surplus location has a transfer planned to send inventory to another location).

#### **Transfer Avail. Alert**

The Transfer Avail. Alert is a calculated measure used to indicate that an alert was triggered by the transfer.

## Transfer by Product View

The **Transfer by Product View**, under the **Manual Transfer tab**, allows you to review transfers from a product perspective. This view provides you with planned and approved transfer information.

**Figure 21-76 Transfer by Product View**

	Transfer Avail. Units	Transfer Deficit Units	Transfer Surplus Units	Transfer Plan In Units	Transfer Plan Out Units	Appr. Transfer In Units	Appr. Transfer Out Units	Exp. Transfer Plan In Units	Exp. Transfer Plan Out Units
1000 Web	17	85							
1005 Philadelphia Outlet	11	53							
1074 Pittsburgh Outlet	15	75							
1075 Newark Outlet	15	75							
1076 Baltimore	12	59							
1077 Richmond	15	74							
1078 Washington D.C.	12	56							
1084 Norfolk	11	53							
1085 Virginia Beach	11	53							
1113 Raleigh	14	69							
1164 New Castle	15	74							
1172 Allegheny	11	53							
1173 Asheville	11	53							
1184 Wilmington	14	50							
1185 Greensboro	14	69							

### Transfer by Product View - Default Profile Measures

The Default measure profile available in the Transfer by Product view contains the following measures.

#### Transfer Avail. Units

The Transfer Avail. Units is a calculated measure used to indicate the total inventory quantity available at the location, for the product, that is available after the planned transfers. This calculation takes into account the available inventory at the location plus the planned transfers, in and out, for the location.

#### Transfer Deficit Units

The Transfer Deficit Units is a calculated measure used to indicate the amount of deficit units for the product and location combination. The values are calculated based on the RUTL calculated at the system date and the available inventory. When the available inventory is not enough for the RUTL then there is a deficit.

#### Transfer Surplus Units

The Transfer Surplus Units is a calculated measure used to indicate the number of surplus units for the product and location combination. The values are calculated based on the RUTL calculated at the system date and the available inventory. When there is more available inventory than necessary to fulfill the RUTL then there is a surplus.

#### Transfer Plan In Units

The Transfer Plan In Units is a calculated measure used to indicate the transfer units planned for the product and destination location combination (for example, populated when a deficit location has a transfer planned to receive inventory from another location).

**Transfer Plan Out Units**

The Transfer Plan Out Units is a calculated measure used to indicate the transfer units planned for the product and source location combination (for example, populated when a surplus location has a transfer planned to send inventory to another location).

**Appr. Transfer In Units**

The Appr. Transfer In Units is a calculated measure used to indicate the transfer units approved for the product and destination location combination.

**Appr. Transfer Out Units**

The Appr. Transfer Out Units is a calculated measure used to indicate the source location's transfer units approved for the product and location combination.

**Exp. Transfer Plan In Units**

The Exp. Transfer Plan In Units is a calculated measure used to indicate the transfer units to be exported from the batch for the product and location combination. In this view, the value is the total of all destination locations for the product.

**Exp. Transfer Plan Out Units**

The Exp. Transfer Plan Out Units is a calculated measure used to indicate the source location's transfer units to be exported from the batch for the product and location combination. In this view, the value is the total of all locations for the product.

## Transfer Deficit From-To View

The **Transfer Deficit From-To View**, under the **Manual Transfer tab**, allows you to review and manage, from the destination locations perspective, the transfers from surplus locations to deficit locations.

**Figure 21-77 Transfer Deficit From-To View**

	1005 Philadelphia	1074 Pittsburgh	1075 Newark	1076 Baltimore	1077 Richmond	1078 Washington	1084 Norfolk	1085 Virginia Beach	1113 Raleigh	1164 New C
2000001 - KTS Low "Home" 2020 Men's Basketball Shoes - 6	Assort. @ Dst.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Aval. @ Dst. Units	17	17	17	17	17	17	17	17	17
	Deficit @ Dst. Units	85	85	85	85	85	85	85	85	85
	Tot. Src Avail. Units	--	--	--	--	--	--	--	--	--
	Surplus @ Src. Units	--	--	--	--	--	--	--	--	--
	Transfer Action	-	-	-	-	-	-	-	-	-
	Sys. Transfer Plan Units									
	Transfer Plan Units									
	Appr. Transfer Units									
	Exp. Transfer Plan Units									
2000002 - KTS Low "Home" 2020 Men's Basketball Shoes - 7	Assort. @ Dst.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Aval. @ Dst. Units	16	16	16	16	16	16	16	16	16
	Deficit @ Dst. Units	72	72	72	72	72	72	72	72	72
	Tot. Src Avail. Units	--	--	--	--	--	--	--	--	--
	Surplus @ Src. Units	--	--	--	--	--	--	--	--	--



## Transfer Deficit From-To View - Default Profile Measures

The Default measure profile available in the Transfer Deficit From-To view contains the following measures.

### **Assort. @ Dst.**

The Assort. @ Dst. is a calculated measure used to indicate if the transfer is allowed between the locations for the product and the destination location has the product assorted. When selected, the transfer is allowed and the product and location is assorted. When clear, either the transfer is not allowed between the locations or the product is not assorted at the destination location.

### **Avail. @ Dst. Units**

The Avail. @ Dst. Units is a calculated measure used to indicate the total inventory units available for the product at the destination location.

### **Deficit @ Dst. Units**

The Deficit @ Dst. Units is a calculated measure used to indicate a deficit of units for the product at the destination location.

### **Tot. Src. Avail. Units**

The Tot. Src. Avail. Units is a calculated measure used to indicate the total inventory units available for the product at the source location.

### **Surplus @ Src. Units**

The Surplus @ Src. Units is a calculated measure used to indicate a surplus of units for the product at the source location.

### **Transfer Action**

The Transfer Action is an editable measure used to indicate, for product and location combinations, the transfer method for the calculation. Valid values are:

- **Avail**  
When this option is selected all available inventory at the source location is transferred.
- **Avail + End**  
When this option is selected all available inventory at the source location is transferred and the system stops the assortment at the source location.
- **Spls -> Dfct**  
When this option is selected the destination location deficit is fulfilled (or reduced) with the surplus inventory from the source location.
- **Avail -> Dfct**  
When this option is selected the destination location deficit is fulfilled (or reduced) with the available inventory from the source location.
- **Spls**  
When this option is selected only the surplus inventory from the source location is moved to the destination location.
- **Undo**  
When this option is selected, the last action or transfer is undone.

### Sys. Transfer Plan Units

The Sys. Transfer Plan Units is a calculated measure used to indicate the transfer of units between the source location and the destination location when there is a surplus that can be transferred from the source location to the destination location. This measure is also recalculated by the **Transfers** action button.

### Transfer Plan Units

The Transfer Plan Units is an editable measure used to enter manually the number of units to be transferred from the source location to the destination location. This measure can also be overridden or calculated by the **Calculate Transfer Plan** action button. It populates or overrides the measure with the number of units to be transferred from the source location to the destination location by taking into account the transfer method selected in the measure Transfer Action.

### Appr. Transfer Units

The Appr. Transfer Units is a calculated measure used to indicate the planned transfers that were approved. The Transfer Plan Units value is copied to this measure by the **Approve Transfers** action button.

### Exp. Transfer Plan Units

The Exp. Transfer Plan Units indicates the exported manual location transfers order (in units).

### Transfer Off Source

When the Transfer Off Source is set to True, then the transfer calculation turns off the assortment of the item from the source location by updating the assortment end date to today's date. This is also set to True automatically if the Transfer action is **Avail + End**.

A use case of this is when an item needs to be moved from Store A to Store B and Store A will never replenish that item again. You can set the Transfer Off Source so that after transferring the item, it turns off the assortment to Store A. Alternatively, you can use the Transfer action, **Avail + End**, to automatically transfer all of the available units from Store A to Store B and then turn off the assortment to Store A.

## Transfer Surplus From-To View

The **Transfer Surplus From-To View**, under the **Manual Transfer tab**, allows you to review and manage, from the source locations perspective, the transfers from surplus locations to deficit locations. This view contains the same measures as the deficit view. For more details regarding the measures description, refer to the Transfer Deficit From-To view.

Figure 21-78 Transfer Surplus From-To View

  |  |
Avail. @ Dst. Units
 17 | 15 | 15 |
Deficit @ Dst. Units
 85 | 75 | 75 |
Tot. Src. Avail. Units
 -- | -- | -- |
Surplus @ Src. Units
 -- | -- | -- |
Transfer Action
 - | - | - |
Sys. Transfer Plan Units
  |  |  |
Transfer Plan Units
  |  |  |
Appr. Transfer Units
  |  |  |
Exp. Transfer Plan Units
  |  |  |
2000002 - KTS Low 'Home' 2020 Men's Basketball Shoes - 7
  |  |  |
Assort. @ Dst.
  |  |  |
Avail. @ Dst. Units
 16 | 12 | 15 |
Deficit @ Dst. Units
 72 | 52 | 68 |
Tot. Src. Avail. Units
 -- | -- | -- |
Surplus @ Src. Units
 -- | -- | -- |
Transfer Action
 - | - | - |

## Filter Step

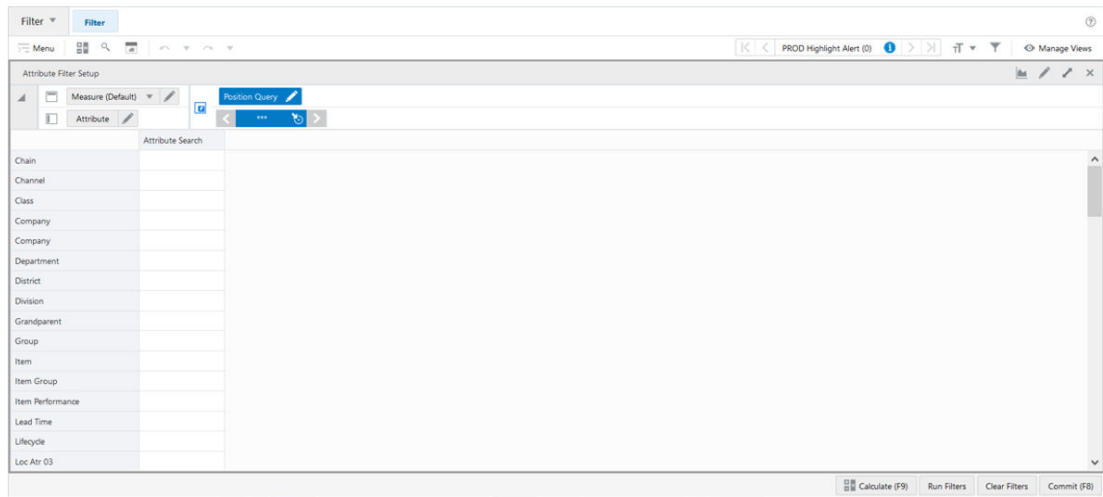
In this step you can set up filters to filter the views within the Review & Approved workspace. This step contains these views:

- [Attribute Filter Setup View](#)
- [Calendar Filter Setup View](#)
- [Filter Setup View](#)
- [Filter Statistics View](#)
- [Quick Filter View](#)
- [User Filter View](#)

## Attribute Filter Setup View

The **Attribute Filter Setup View**, under the **Filter tab**, is similar to the Filter Attribute view within the Manage Alert Parameters workspace. The difference is that the filter, in this step, is applied to the Review & Approved workspace views in a similar way to how they are described in the Manage Alert Parameters workspace. For more details regarding the view and the measures, refer to the Filter Attribute view in the Filters step within the Manage Alert Parameters workspace.

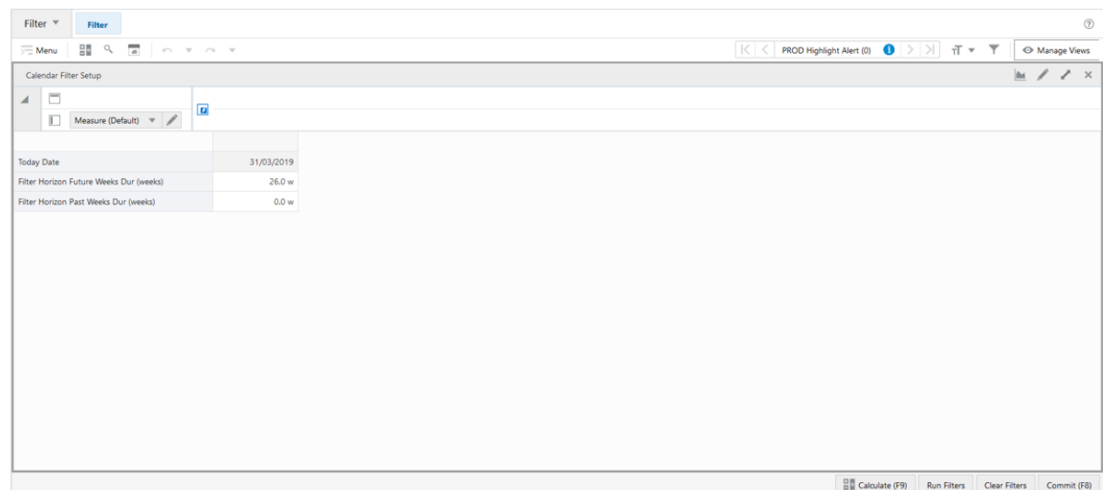
**Figure 21-79 Attribute Filter Setup View**



## Calendar Filter Setup View

The **Calendar Filter View**, under the **Filter tab**, is similar to the Filter Calendar view within the Manage Alert Parameters workspace. The difference is that the filter, in this step, is applied to the Review & Approve workspace views in a similar way to how they are described in the Manage Alert Parameters workspace. For more details regarding the view and the measures, refer to the Filter Calendar view in the Filters step within the Manage Alert Parameters workspace.

**Figure 21-80 Calendar Filter Setup View**



## Filter Setup View

This view allows you to define the conditions for the rules based in product, location, and product-location attributes. A rule condition is what allows the engine to find the product and location combinations where the rule is applicable.

**Figure 21-81 Filter Setup View**

Measure	Cond Attribute	Within Cond Op	Cond Value	Cond Value String	Cond Value Measure	Cond Value Date	Between Cond Op	Cond Order	Cond Group	Validation Result	Invalid Flag	Valid Flag
condition 01	Department	==	0.00	Missy			AND	1	1	(dept == missy and	<input type="checkbox"/>	<input checked="" type="checkbox"/>
condition 02	Class	!=	0.00	Missy Sweaters				2	1	cls != missy_sweaters)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
condition 03			0.00					3	1		<input type="checkbox"/>	<input type="checkbox"/>
condition 04			0.00					4	1		<input type="checkbox"/>	<input type="checkbox"/>

### Filter Setup View - Default Profile Measures

The Filter Setup view contains the following measures.

#### Condition Attribute

The Condition Attribute measure allows you to select the attribute for the condition, The attributes for the rules are assigned in the Attribute Review workspace.

#### Within Cond Op

The Within Cond Op measure allows you to specify the operator to be used inside the condition.

**Table 21-2 Within Cond Op Measure Available Operators**

Possible Operators	Descriptions	Example
==	Checks if the attribute value is equal with the Condition Value	brand == Private Label
!=	Checks if the attribute value is different from the Condition Value	average sales != 0
>	Checks if the attribute value is larger than the Condition Value	Average sales >5
>=	Checks if the attribute value is larger or equal to the Condition Value	
<	Checks if the attribute value is less than the Condition Value	Standard deviation of sales <6
<=	Checks if the attribute value is less or equal to the Condition Value	
contain		
not contain		
match		
not match		

#### Cond Value

The Cond Value measure is used when the type of the attribute is numeric. Example: average sales > 10

#### Cond Value String

The Cond Value String measure is used when the type of the attribute is a string. Example:  
brand == Private Label

### Cond Value Measure

The value of the Cond Value measure is a measure name, which is populated by an expression that let's you refine the condition value. For instance private label versus non-private label.

This measure is used when you want to refine the condition value.

For instance, for the coffee items, except Private Label, you want to assign items to the rule that sell more than 50 per week. For Private Label items you may want the value to be 100. You need to populate your Condition measure with a value of 100 for all Private Label items, and the rest of the coffee items with 50.

### Cond Value Date

The Cond Value Date measure is used when the type of the attribute is a date. Example: today  
>= 02/30/2024"

### Between Cond Op

Within a rule there can be multiple conditions and also multiple condition groups. This is specified in the Cond Group measure. Conditions with the same Cond Group value belong to the same group.

For example, if a rule has 4 conditions, Conditions 1 and 2 can belong to condition group 1, and conditions 3 and 4 can belong to the condition group 2. Also, the Cond Order measure gives the ranking of the conditions inside the group.

The following table is an assumed use case:

**Table 21-3 Between Cond Op Assumed Use Case**

Condition	Between Con Op	Cond Order	Cond Group
Condition 1	AND	1	1
Condition 2	OR	2	1
Condition 3	OR	3	2
Condition 4		4	2

The value for the Between Cond Op can be the logical operators AND or OR.

The conditions are evaluated first inside a condition group and then between groups. In the previous case, the resulting condition is:

(Condition 1 **AND** Condition 2) **OR** (Condition 3 **OR** Condition 4)

Here is an example where all conditions belong to the same condition group:

**Table 21-4 Example: All Conditions Belong to the Same Condition Group**

Condition	Between Con Op	Cond Order	Cond Group
Condition 1	AND	1	1
Condition 2	OR	2	1
Condition 3	OR	3	1

**Table 21-4 (Cont.) Example: All Conditions Belong to the Same Condition Group**

Condition	Between Con Op	Cond Order	Cond Group
Condition 4		4	1

The resulting condition for the rule is given by:

Condition 1 **AND** Condition 2 **OR** Condition 3 **OR** Condition 4

Note that the conditions are evaluated in the order given by the values in the Cond Order measure.

### Cond Order

The Cond Order measure displays the order in which conditions are evaluated, wither independently or inside a condition group.

### Cond Group

The Cond Group measure allows you to group conditions. This is useful when you want to evaluate conditions in a two-step process. First, the conditions are evaluated inside groups. In the second step, the group results are evaluated .

### Validation Result

The Validation Result measure displays the condition expressions that are validated.

### Invalid Flag

The Invalid Flag measure indicates if a condition is invalid.

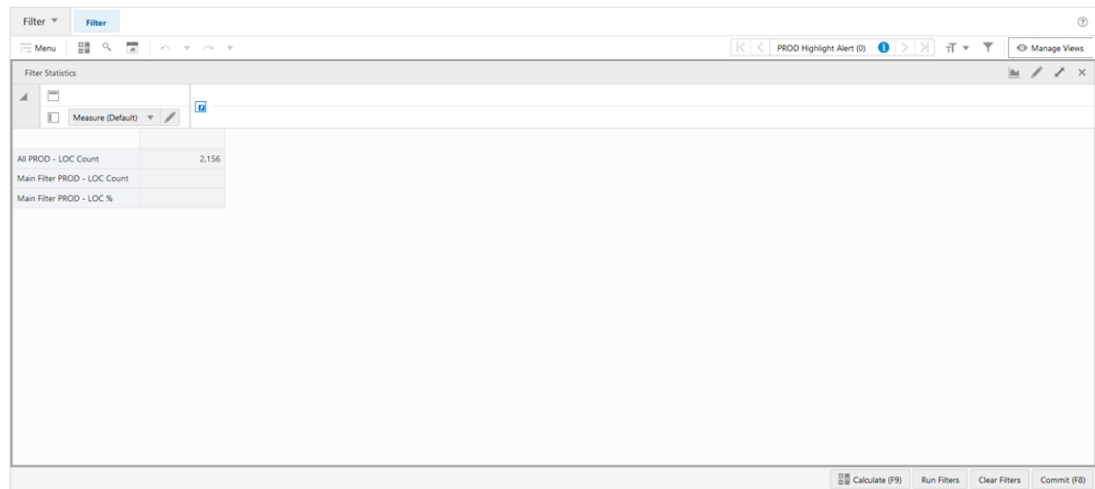
### Valid Flag

The Valid Flag measure indicates if a condition is valid.

## Filter Statistics View

The **Filter Statistics View**, under the **Filter tab**, is similar to the Filter Statistics view within the Manage Alert Parameters workspace. The difference is that the filter, in this step, is applied to the Review & Approve workspace views in a similar way to how they are described in the Manage Alert Parameters workspace. For more details regarding the view and the measures, refer to the Filter Statistics view in the Filters step within the Manage Alert Parameters workspace

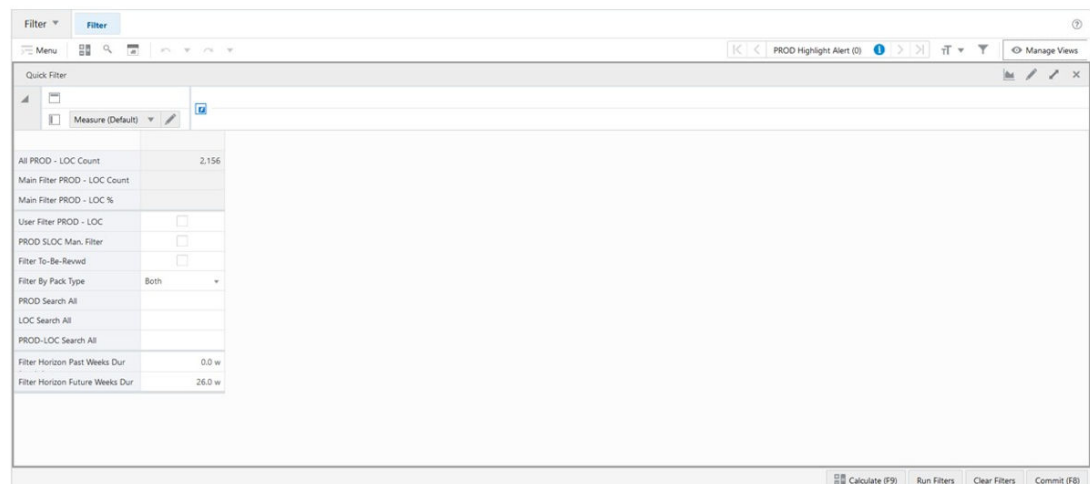
Figure 21-82 Filter Statistics View



## Quick Filter View

The **Quick Filter View**, under the **Filter tab**, allows you to review and configure the filter to be applied to the views within the Review & Approve workspace. In this view, you can check filter statistics and configure the filter to be applied to the product, location, and calendar hierarchies (for example, calendar horizon, string search in product attributes, and so on). Once that a change is performed it is applied after running the workspace calculation (either **Calculate** or **F9**).

Figure 21-83 Quick Filter View



### Quick Filter View - Default Profile Measures

The Quick Filter view contains the following measures.

#### All PROD-LOC Count



The All PROD-LOC Count is a calculated measure used to indicate the total number of product and location combinations assorted.

#### **Main Filter PROD - LOC Count**

The Main Filter PROD - LOC Count is a calculated measure used to indicate the total number of product and location combinations that were filtered by the filter configured in this view.

#### **Main Filter PROD - LOC %**

The Main Filter PROD - LOC % is a calculated measure used to indicate, in percentage, how much the filtered product and location combinations represent on the total count of product and location combinations assorted

#### **User Filter PROD-LOC**

The User Filter PROD-LOC is an editable measure used to restrict the filter by the product and location combinations when the measure User Filter PROD-LOC is selected.

#### **PROD SLOC Man. Filter**

The PROD SLOC Man. Filter is an editable measure used to filter the relevant product and location in the manual transfer view.

#### **Filter To-Be-Revwd**

The Filter To-Be-Revwd is an editable measure used to add in the filter a condition to display only product and location combinations with alert hits that still need to be reviewed by you.

#### **Filter By Pack Type**

The Filter By Pack Type is an editable measure used to define the type of packs that the filter should include in the condition. Valid values are:

- **Both**  
When selected, the filter includes all pack products – Simple and Complex pack types.
- **Simple**  
When selected, the filter only includes simple pack type products.
- **Complex**  
When selected, the filter only includes complex pack type products.

#### **PROD Search All**

The PROD Search All is an editable measure used to define the string to search in all product attributes. Note that the label is a product attribute.

#### **LOC Search All**

The LOC Search All is an editable measure used to define the string to search in all location attributes. Note that the label is a location attribute.

#### **PROD-LOC Search All**

The PROD-LOC Search All is an editable measure used to define the string to search in all product-location-attributes (for example, lifecycle).

#### **Filter Horizon Past Weeks Dur (weeks)**

The Filter Horizon Past Weeks Dur (weeks) is an editable measure used to indicate the number of past weeks that should be displayed in the views where the calendar is available

(for example, Inventory planning views). The relevant views are filtered by based on the number of weeks specified here.

### Filter Horizon Future Weeks Dur (weeks)

The Filter Horizon Future Weeks Dur (weeks) is an editable measure used to indicate the number of future weeks that should be displayed in the views where the calendar is available (for example, Inventory planning views). The relevant views are filtered by based on the number of weeks specified here.



#### Note:

Once the workspace calculation is run (either **Calculate** or **F9**), the relevant views are filtered based on the filter set up completed in this view.

## Review & Approve Action Buttons

The Review & Approve workspace has the following action buttons available:

- **Seed User Filter**  
Use the **Seed User Filter** action button to seed the User Filter from a specified alert which populates the Boolean User Filter measure.
- **Run Filters**  
Use the **Run Filters** action button for applying the filters in the Review & Approve workspace based on the filter set up completed in the Filter step. For example, filter based on the User Filter measures.
- **Clear Filters**  
Use the **Clear Filters** action button for to remove all filters applied to the views within the Review & Approve workspace.
- **Reload Parameters**  
Use the **Reload Parameters** action button to reload, from the domain into the workspace, all the replenishment parameters that are managed in the Replenishment Parameters workspace.
- **Synchronize Forecast**  
Use the **Synchronize Forecast** action button to reload the latest adjusted forecast from the domain into the workspace and re-calculate the forecast aggregation measures (for example, Fcst W+0 to W+2 Units). It is primarily used when 'what if' scenarios are being worked on.
- **Calculate Plan**  
Use the **Calculate Plan** action button to calculate the replenishment for all the products and locations in the workspace's scope using the set up and parameters available within the Review & Approve workspace. Using this action button you can change the replenishment parameters, by overriding the original values, and complete a what-if scenario to check the impact on replenishment results.
- **Replenishment Approval**  
Use the **Replenishment Approval** action button to approve all product and location replenishments that are selected to be approved. When the product and location

combination is selected to be approved (measure Appr. Rpl. Plan) then the system replenishment is copied to the approved replenishment.

- **Within Day Exp. Refresh**

Use the **Within Day Exp. Refresh** action button to refresh the exported transfers and inventory plan measures by pulling the values from the domain. Typically, this action is run after the intra-day batch to export transfers and inventory plan is run.

- **Visual Assortment**

Use the **Visual Assortment** action button to calculate the images across the planning calendar in the workspace's scope. This provides you with a visual for the assortment across the calendar.

- **Calculate Inventory Plan**

Use the **Calculate Inventory Plan** action button to calculate the weekly inventory plan for all the products and locations in the workspace's scope using the inventory plan parameters available within the A & R workspace. Using this action button, you can, for example, change the inventory plan parameters, by overriding the original values, and complete a what-if scenario to check the impact in the weekly inventory plan results.

- **Plan Approval**

Use the **Plan Approval** action button to approve all the products, locations and weeks' inventory plans that are selected to be approved. When the product, location, and week combination is selected to be approved (measure Appr. Plan (Wk)) then the system inventory plan is copied to the approved inventory plan. This action button also populates the audit measures that allows you to know when the action was taken and by whom.

- **Calculate Transfer Plan**

Use the **Calculate Transfer Plan** action button to calculate the transfers from the source locations to the destination locations based on the transfer set up completed in the Transfer Step views (for example, allowed transfer locations matrix, units of deficit or surplus).

- **Approve Transfers**

Use the **Approve Transfers** action button to approve all the calculated transfers from the source locations to the destination locations. Specific transfers cannot be chosen by you. All planned transfers within the workspace scope are approved.

- **Clear Transfers**

Use the **Clear Transfers** action button to clear all the planned transfers. It cleans the transfer action and the in and out planned transfer units.

## User Filter View

The **User Filter View**, under the **Filter tab**, is similar to the User Filter view within the Manage Alert Parameters workspace. The difference is that the filter, in this step, is applied to the Review & Approve workspace views in a similar way to how they are described in the Manage Alert Parameters workspace. For more details regarding the view and the measures, refer to the User Filter view in the Filters step within the Manage Alert Parameters workspace.

Figure 21-84 User Filter View

The screenshot displays the Oracle User Filter View interface. At the top, there is a navigation bar with 'Overview' and 'To-Do List' tabs. Below this is a 'User Filter' window with a toolbar containing 'All Dimensions', 'Measure (Default)', and 'Position Query'. The main area is a grid with columns for 'Location' (1003 Boston, 1004 New York, 1006 Chicago, 1030 Salem, 1037 Green Bay, 1058 Madison, 1059 Milwaukee, 1060 Rockford, 1061 Aurora, 1062 Peoria, 1066 Fort Wayne, 1067 South Bend, 1068 Lansing) and rows for 'Product' (e.g., 1000010 - Leather Loafer - Black 6 B, 1000011 - Leather Loafer - Black 6.5 B, etc.). Each cell in the grid contains a checkbox. At the bottom right, there are buttons for 'Calculate (F8)', 'Seed User Filter', 'Run Filters', 'Clear Filters', and 'Commit (F8)'.

Product	Location	1003 Boston	1004 New York	1006 Chicago	1030 Salem	1037 Green Bay	1058 Madison	1059 Milwaukee	1060 Rockford	1061 Aurora	1062 Peoria	1066 Fort Wayne	1067 South Bend	1068 Lansing
1000010 - Leather Loafer - Black 6 B		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1000011 - Leather Loafer - Black 6.5 B		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1000012 - Leather Loafer - Black 7 B		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1000013 - Leather Loafer - Black 7.5 B		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1000014 - Leather Loafer - Black 8 B		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1000015 - Leather Loafer - Black 8.5 B		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1000016 - Leather Loafer - Black 9 B		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1000017 - Leather Loafer - Black 9.5 B		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1000018 - Leather Loafer - Black 10 B		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1000019 - Leather Loafer - Brown 6 B		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1000020 - Leather Loafer - Brown 6.5 B		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1000021 - Leather Loafer - Brown 7 B		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1000022 - Leather Loafer - Brown 7.5 B		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1000023 - Leather Loafer - Brown 8 B		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1000024 - Leather Loafer - Brown 8.5 B		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1000025 - Leather Loafer - Brown 9 B		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1000026 - Leather Loafer - Brown 9.5 B		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1000027 - Leather Loafer - Brown 10 B		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1000029 - Leather Lace-up - Black 9 D		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1000030 - Leather Lace-up - Black 9.5 D		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1000031 - Leather Lace-up - Black 10 D		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1000032 - Leather Lace-up - Black 10.5 D		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# A

## Appendix: Forecast Approval Exceptions

This appendix provides the details on approval and navigation exceptions defined for the GA version of IPOCS-Demand Forecasting.

The exception management framework available in RPASCE works on several levels. First, the users refines the approval and navigation rules in the Business Rule Engine.

The forecast approval method is one of the following options:

- Manual  
The system-generated forecast is not automatically approved. Forecast values must be manually approved by accessing and possibly amending values in the Forecast Review workspace.
- Automatic  
The system-generated forecast is automatically approved as is.
- By exception  
This list contains the exceptions that were configured for use in the forecast approval process. They should match the dashboard exceptions and workspace alerts.

The unapproved product/locations are then assigned in order of priority to one of the following buckets:

- Urgent
- Required
- Optional
- Informational

Both the approval and navigation features can be configured to fit retailers' needs.

Then, the batch is run and the approval and navigation exceptions are worked out. Now it is time to review them and take actions. First there is the dashboard. You can review the approval exception tiles and see which business rules had a larger impact. The navigation exception profile displays how many production/locations are in each of the navigation buckets. This helps you plan your work when reviewing forecasts in order of priorities, assigned using business rules. From here you can open the Forecast Review workspace. Once in the workspace, you can decide how to review the forecasts. Every dashboard exception can have a workspace alert counterpart. You can navigate to product/locations that are flagged as exceptions, or you can use the workspace exceptions, that point you to cells where the business rules have been violated. This is possible because the workspace alerts have the time dimension while dashboard exceptions are at the production/location intersection, pointing you to the time series that needs attention.

The following details the GA approval alerts calculations.

### Forecast versus Recent Sales

Usually it is not expected that demand values differ very much period to period. This also implies that the forecast magnitude generally is in line with the magnitude of the most recent

sales. There are cases when this is not the case. For instance when an item enters a season, the forecast is probably higher than the sales in periods leading to the season. Or when an item is towards the end of the season, the forecast will be lower than sales in peak periods. For these cases, the user can be alerted to review the forecast, rather than auto approving it.

The following is the alert expression:

$$\sum_{today-alert\ window\ length-1}^{today-1} baseline\ demand(t) > 0$$

&&

$$\frac{\sum_{today}^{today+alert\ window\ length} adjusted\ baseline(t)}{alert\ window\ length} > threshold1$$

&&

$$\left| \frac{\sum_{today}^{today+alert\ window\ length} adjusted\ baseline(t)}{\sum_{today-alert\ window\ length-1}^{today-1} baseline\ demand(t)} - 1 \right| > threshold2$$

Where *length*, *threshold1*, and *threshold2* are adjustable parameters.

Note how the calculations are not performed for the entire forecast horizon, but rather by the number of periods determined by the length parameter. The reason is that the forecast horizon can sometimes be very long; for example, 52 weeks, and average demand over such a long time period cannot be used as in-season versus out of season rate of sales.

## Adjusted versus Approved

IPOCS-Demand Forecasting is typically set up to generate forecast weekly. Every week, new sales data is loaded, the forecast is regenerated. While the latest data points are expected to make the forecast more accurate, it is not expected that the difference in forecasts generated in two consecutive weeks to vary too much. If the forecasts differ, the user is alerted to review the forecasts.

The following is the alert expression:

$$\left| \frac{\sum_{today}^{today+forecast\ length-1} adjusted\ forecast(t)}{\sum_{today}^{today+forecast\ length-1} lappf(t)} - 1 \right| > threshold1$$

$$\frac{\sum_{today}^{today+forecast\ length-1} adjusted\ forecast(t)}{forecast\ length - 1} > threshold2$$

Where *threshold1* and *threshold2* are adjustable parameters.

Note how summation of forecasts is not performed over the entire forecast length. It is stopped one period prior the forecast horizon ends, because this is the last populated period of the last approved forecast.

## Forecast versus Last Year Sales

The most reliable forecasts are generated from data that has a repeatable pattern year over year. However, this is not always the case. A change in business strategy, merchandise reclassifications, New Items can all lead to changing selling patterns over time.

To detect possible changes in selling patterns, the following alert will compare the last year's sales volume with the forecasted sales volume. If they are different by an adjustable percent, the alert is triggered.

The following is the alert expression:

$$\frac{\sum_{today}^{today+alert\ window\ length} adjusted\ baseline(t)}{alert\ window\ length} > threshold1$$

$$\parallel$$

$$\frac{\sum_{today}^{today+alert\ window\ length} baseline\ demand\ LY(t)}{alert\ window\ length} > threshold1$$

$$\&\&$$

$$\left| \frac{\sum_{today}^{today+alert\ window\ length} adjusted\ baseline(t)}{\sum_{today}^{today+alert\ window\ length} baseline\ demand\ LY(t)} - 1 \right| > threshold2$$

Where *threshold1* and *threshold2* are adjustable parameters.

First we check if the forecast is close to the sales LY. If it is, no alert is triggered. If it is not, we check the rate of sales of the item. If the item is selling consistently, we trigger an alert. If the sales and forecast are different, but the rate of sales of the item is not significant - defined by *threshold2*, no alert is triggered. This way we avoid prompting the user to review forecasts for low selling items.

## Promo Peaks

The purpose of this alert is to check how large the forecast peaks are compared to historical demand. The peaks can come from various effects like promotions, price discount, demand transference due to assortment changes, and so on. The most common, though, are due to price changes and promotions.

The following is the alert expression:

$$Adjusted\ Peak > Max\ Sales\ History * Causal\ Peak\ Factor$$

Where the *Causal Peak Factor* is an adjustable parameter.

The business case this addresses is to alert you when the peaks in the forecast region are larger than any observed sales in the past. There may be valid justification for this, for instance, several events are active in the same time period, thus creating a huge spike in demand. You can review the alert and take action.

### Enabling GA Approval Alerts

The process around enabling GA approval alerts is as follows:

1. GA alerts to be used in the approval process are configured in the IPO-DF plug-in
2. Only alerts enabled in the plug-in can be selected for the approval method in the Forecast Setup workspace.
3. The Forecast Approval process is limited to only the alerts selected in the Forecast Setup workbook. It calculates all of the enabled alerts for the unapproved sku/store combinations.
4. The dashboard then displays all of the enabled alerts for the unapproved sku/stor. However, the approval process is limited to only whatever was selected as the approval method.
5. *Forecast vs. Last Year Sales Batch Alert* is the same as *Forecast versus Last Year Sales*.



# B

## Appendix: Forecast Errors in the Forecast Scorecard Dashboard

This appendix provides background and formulas for the error metrics used in the Forecast Scorecard dashboard. The errors are always calculated at the lowest level - typically item/store/week, and then averaged at the intersection of the dashboard tiles. For GA this intersection is subclass/district, but it can be configured at implementation time. The evaluation of the forecast is done over a window starting today and looking back a configurable number of periods. All errors are calculated for the system-generated forecast as well as the user adjusted forecast.

The following are the error metrics:

- Mean Absolute Percent Error
- Root Mean Squared Error
- Mean Absolute Error
- Forecast Bias
- Percent Adjusted

### Mean Absolute Percent Error

The percentage error of a forecast observation is the difference between the actual POS value and the forecast value, divided by the actual POS value. The result of this calculation expresses the forecast error as a percentage of the actual value. The Mean Absolute Percentage Error statistic measures forecast accuracy by taking the average of the sum of the absolute values of the percentage error calculations across all observations. This method is useful when comparing the accuracy of forecasts for different volume products (it normalizes error by volume).

$$MAPE = \frac{100\%}{n} \sum_{t=1}^n \left| \frac{demand(t) - forecast(t)}{demand(t)} \right|$$

### Root Mean Squared Error

This is the square root of the Mean Squared Error. The Root Mean Squared Error is one of the most commonly used measures of forecast accuracy because of its similarity to the basic statistical concept of a standard deviation. It evaluates the magnitude of errors in a forecast on a period-by-period basis, and it is best used to compare alternative forecasting models for a given series.

$$RMSE = \sqrt{\frac{\sum_{t=1}^n (demand(t) - forecast(t))^2}{n}}$$

## Mean Absolute Error

The absolute error of a forecast observation is the absolute value of the difference between the forecast value and the actual POS value. The Mean Absolute Error statistic is a measure of the average absolute error. This is calculated by summing the absolute errors for all observations and then dividing by the number of observations to obtain the average. Mean Absolute Error gives you a better indication of how the forecast performed period by period because the absolute value function ensures that negative errors in one period are not canceled out by positive errors in another. Mean Absolute Error is most useful for comparing two forecast methods for the same series.

$$MAE = \frac{\sum_{t=1}^n |demand(t) - forecast(t)|}{n}$$

## Forecast Bias

Forecast BIAS is described as a tendency to either:

- over-forecast (meaning, more often than not, the forecast is more than the actual)
- under-forecast (meaning, more often than not, the forecast is less than the actual).

A desired property of a forecast is that it is not biased.

$$BIAS = \frac{100\%}{n} \sum_{t=1}^n \frac{demand(t) - forecast(t)}{demand(t)}$$

## Percent Adjusted

This number represents the count of adjusted forecast values divided by the total count of forecast values. A high percentage indicates that the users heavily adjust the forecasts.

# C

## Appendix: Business Rule Engine

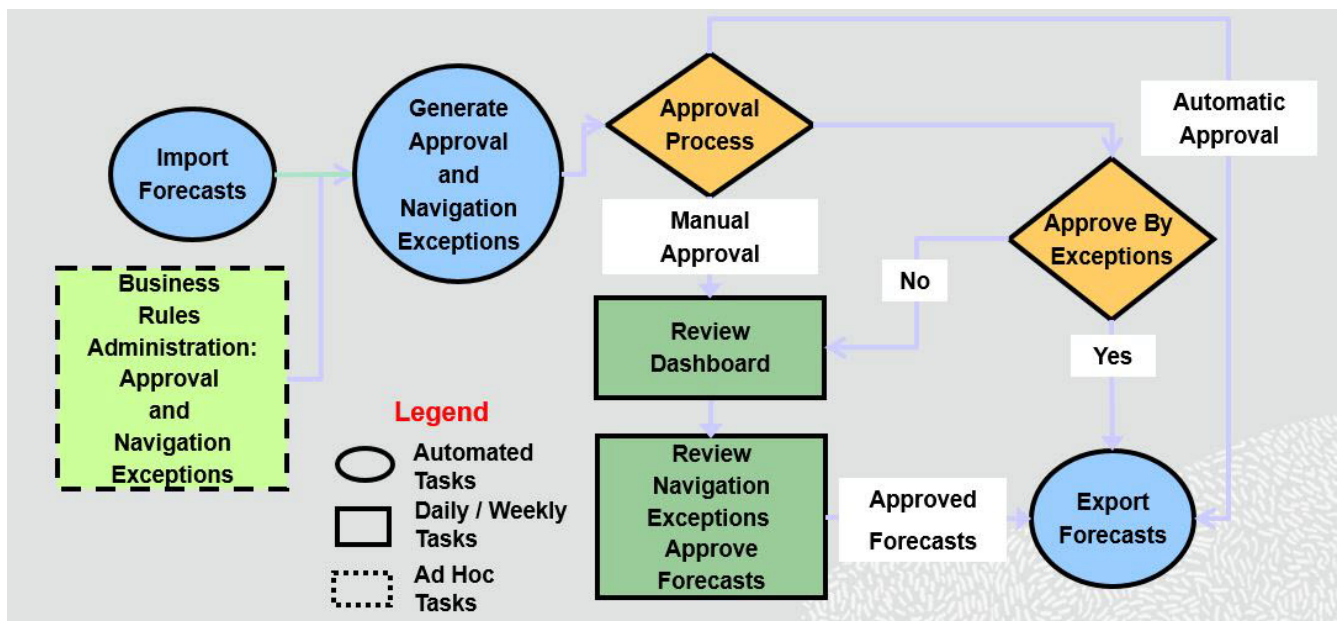
Oracle Retail has designed the Business Rule Engine (BRE) to help IPOCS-Demand Forecasting users set up business strategies to manage parameters used in the forecast approval and navigation processes. Parameters include alert thresholds, alert calculation window, as well as navigation criteria. These parameters can be set up manually in the forecast setup workbook at the global, intermediate, and final levels (override). With the business rule engine, the parameter values at final level can be dynamically adjusted based on business requirements. No patching of the environment is required. For example, a business strategy can be to set the alert error threshold to 10% for all product/locations combos with average sales larger than 10 units per week. For product/locations with average sales less than 10 units per week, the threshold can be relaxed to 20%. This way high sellers have a tighter error threshold because they are more important for the business, and the analysts may want to review their forecasts more rigorously. Using this approach, the parameter values were assigned to product/locations based on business strategy rather than hierarchy positions.

The BRE is used in br-engine.fm mainly in the approval process. This has been refined to include multiple stages. At a high level these are:

- Automatically adjust the system forecast
- Run the approval exceptions
- Assign the unapproved product/locations to navigation buckets based on business priorities you have set up
- Finally, in the Forecast Review workspace, review/adjust/approve product/locations being guided by the navigation exceptions.

Figure C-1 depicts the overall approval process

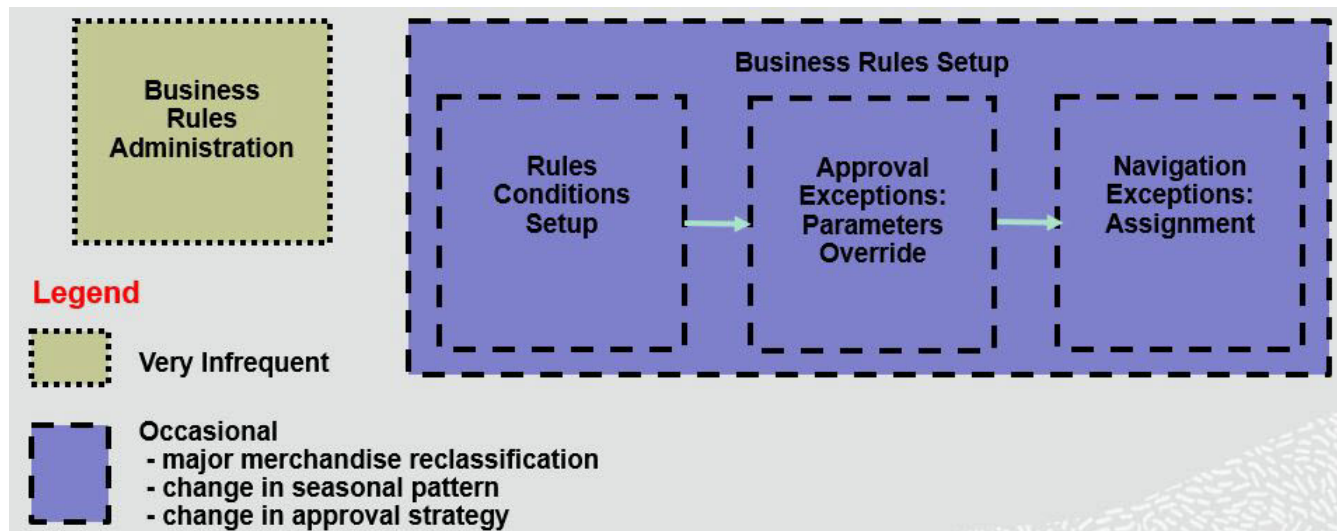
Figure C-1 Approval Workflow



Notice how the work done in the BRE is mentioned as an infrequent task. You only need to access it when you want to change business rules regarding approval and/or navigation strategies.

The interaction with the BRE is depicted in [Figure C-2](#).

**Figure C-2 Business Rule Engine**



You start with the rules conditions, then adjust the approval exceptions requirement, and finally the navigation strategies.

Examples of how approval rule conditions can be used:

- High margin items: tighten approval criteria
- Key items: never approve, too important
- Product/locations not in season: approve automatically
- Low sellers: Loosen approval criteria

After the approval exception process is run, there will be a pool of product/locations that are approved and a pool of product/locations that are not approved. However, not all product/locations in this pool have the same criticality.

This is where the navigation exceptions come in the picture. The unapproved product/locations are run through the business rules for navigations and assigned to different navigation buckets. Let say we have four buckets for navigation: **Urgent**, **Required**, **Optional**, and **Informational**. You can set conditions to achieve the following assignments on unapproved product/locations to navigation buckets (or tiers).

- **Urgent**- key items, high sellers
- **Required**- decent sellers and high navigation variance
- **Optional**- high navigation variance
- **Informational**- all other unapproved items

**Note:**  
 The navigation variance is calculated during the approval exception process and it records by how much the forecast was off from the measure it was compared to.

Figure C-3 illustrates the concepts of approval and navigation conditions, as well as how they support the approval workflow for the previous example.

Figure C-3 Rule Conditions

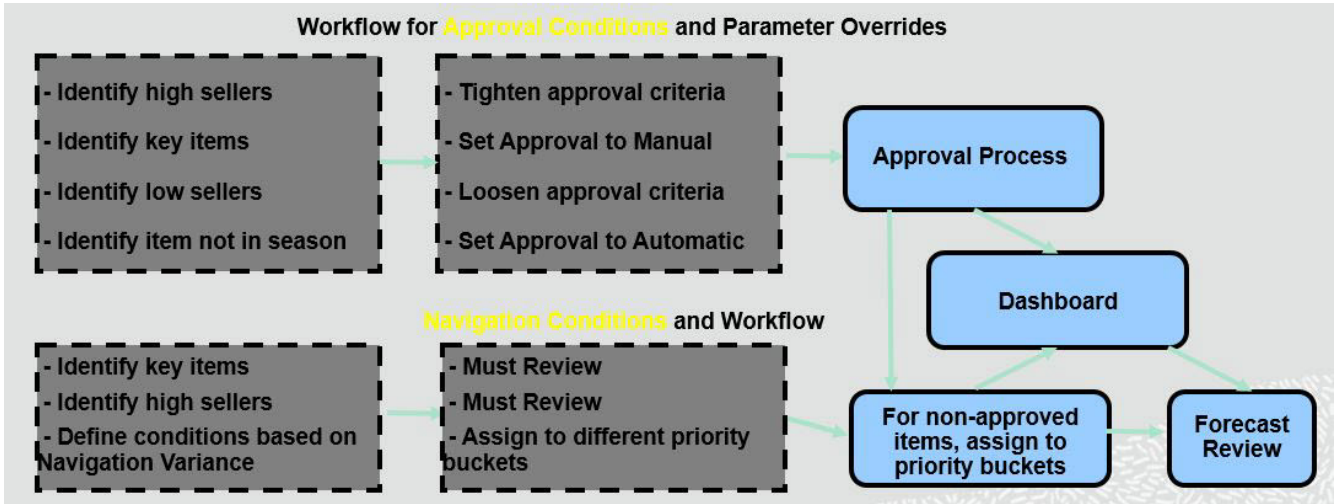


Figure C-4 and Figure C-5 show images of the Rule Condition Setup views in the UI for approval and navigation.

Figure C-4 Approval Conditions

2. Rule Condition Setup

Measure (Default) [edit icon]

Business Rule [edit icon] Rule Condition [edit icon]

Business Rule	Rule Condition	Measure	Attribute Selected	Between Condi...	Condition Operator	Condition Value (string)	Condition Value (...)
high volume	condition 01	Recent Average Sales	↑	OR	↑	>=	200.00
	condition 02	HighPriority Item 01	↓		↓	==	1.00
low volume	condition 01	Recent Average Sales	↓		↓	<	100.00
	condition 02		↓		↓		0.00

Figure C-5 Navigation Conditions

2. Rule Condition Setup

Measure (Default) [edit icon]

Business Rule [add icon] [edit icon] Rule Condition [add icon] [edit icon]

Business Rule	Rule Condition	Measure	Attribute Selected	Between Condi...	Condition Operator	Condition Value (string)	Condition Value (numeric)
1. Urgent	condition 01		HighPriority Item 01	OR	==		1.00
	condition 02		Recent Average Sales		>=		100.00
2. Required	condition 01		Navigation Variance	AND	>=		0.45
	condition 02		Class		==	Coffee	0.00

# D

## Appendix: IPOCS-Lifecycle Allocation and Replenishment Exceptions & Alerts

This appendix provides the complete list of alerts defined for the GA version of IPOCS-Lifecycle Allocation and Replenishment. The list of alerts includes alerts for the IPOCS-Lifecycle Allocation and Replenishment set up validation and alerts for IPOCS-Lifecycle Allocation and Replenishment data validation (for example, generated orders).

The exception management framework available in RPASCE works on different levels. Starting with the dashboard component, the exception profiles allow you to view the hit count for every exception. Once in the workspace, you can use the workspace alerts to navigate to the product/location combination (or product/location/weeks) that have been flagged. Every dashboard exception has a workspace alert counterpart. The calculation expressions are not identical, because the dashboard exceptions are at the production/location intersection, while the workspace alerts also have the time dimension.

Finally, every defined exception can be used in the approval logic. Order approval can be controlled by the alerts:

- **Manual**

The system-generated orders are not automatically approved. Order values must be manually approved by accessing and possibly amending values in the A & R Admin workspace.

- **Automatic**

The system-generated orders are automatically approved as is (no blocking alerts triggered).

- **By Exception**

This list contains the exceptions that were configured for use in the replenishment approval process. They should match the dashboard exceptions and workspace alerts.

There are two types of Exception Alerts:

- **Setup Exceptions**
- **Replenishment Exceptions**

### Setup Exceptions

The Setup exceptions are used to alert you for potential set up issues in the supply chain network. The following are all set up exceptions available in IPOCS-Lifecycle Allocation and Replenishment.

- **BOD Exception Count**

This exception indicates what ranged products and locations are currently with no Bill of Distributions (BOD)s assigned.

- **Lifecycle Phase Exception Count**

This exception indicates what ranged products and locations are currently with no lifecycle phase defined.

- **Planning Calendar Exception Count**

This exception indicates what ranged products and locations are currently with no planning calendar assigned.

### Replenishment Exceptions

Use the replenishment exceptions to alert you for potential issues in the replenishment parameters set up and for specific exceptions that might need to be looked at, for example, a replenishment watch list.

During the batch, IPOCS-Lifecycle Allocation and Replenishment calculates the system proposed order after which the alerts are calculated. Once calculated the alerts are used by IPOCS-Lifecycle Allocation and Replenishment to let the system know if the proposed orders can be approved or not. If for specific item/location combinations, there are critical alerts (alerts classified as critical are within the Review Alerts workspace) then IPOCS-Lifecycle Allocation and Replenishment does not auto-approve the orders and you must review them before approving manually within the system. Following are all the replenishment exceptions available in IPOCS-Lifecycle Allocation and Replenishment.

- **Future Promotions**

This exception indicates what ranged item/location combinations have promotions flagged in the future. You can then review the replenishment and take the necessary action in preparation for the promotion (for example, increment the replenishment values before the start of the promotion).

- **Replenishment Watch-List**

This exception indicates what items/location combination are in the replenishment watch list. This alert allows you to keep track of replenishment for specific item/location combinations. This exception is not automatically calculated by IPOCS-Lifecycle Allocation and Replenishment. You are able to include or exclude item/location combinations from the replenishment watch list within the Review Alerts workspace. IPOCS-Lifecycle Allocation and Replenishment uses those values to calculate this exception.

- **Lifecycle Mat to EOL**

This exception indicates what ranged item/location combinations have a lifecycle phase change from Maturity to EOL. The alert is valid for 7 days so you can review item/location combinations that changed from Lifecycle Mat to EOL for the last 7 days.

- **No Replenishment**

This exception indicates the ranged item/location combinations with valid lifecycles that have an unconstrained need but have no system, approved, or exported plan.

- **No Replenishment Method**

This exception indicates the ranged item/location combinations with valid lifecycles and no replenishment method (parameters) assigned to them. The replenishment parameters need to be reviewed for these item/location combinations.

- **Overstock (current)**

This exception indicates the ranged item/location combinations that have surplus quantity based on the next run order (point-in-time replenishment). The surplus quantity is only considered if it is higher than a defined threshold, which can be specified in units or percentages. The calculation is as follows (the assumption to apply the calculations is that there is a surplus. Otherwise, the alert is not triggered):



**Figure D-1 Units Calculation**

$$Tot. Dest. Avail. Units > (RUTL@ Today Units + Overstock (Current) Threshold Units)$$

**Figure D-2 Percentage Calculation**

$$Tot. Dest. Avail. Units > \left( RUTL@ Today Units + \left( RUTL@ Today Units * \frac{Overstock (Current) Threshold \%}{100} \right) \right)$$

- **Shortage (current)**

This exception indicates the ranged item/location combinations that have a deficit quantity based on the next execution order (point-in-time replenishment). The deficit quantity is only considered if it is less than a defined threshold, which can be specified in units or percentages. The calculation is as follows (the assumption to apply the calculations is that there is a deficit. Otherwise, the alert is not triggered):

**Figure D-3 Units Calculation**

$$Tot. Dest. Avail. Units < (RUTL@ Today Units - Shortage (Current) Threshold Units)$$

**Figure D-4 Percentage Calculation**

$$Tot. Dest. Avail. Units < \left( RUTL@ Today Units - \left( RUTL@ Today Units * \frac{Shortage (Current) Threshold \%}{100} \right) \right)$$

- **Forecast Watch-List**

This exception indicates what item/location combinations are in the forecast watch list. This alert allows you to keep track of specific item/location combinations forecast. This exception is not automatically calculated by IPOCS-Lifecycle Allocation and Replenishment. You can include or exclude item/location combinations from the forecast watch list within the Review Alerts workspace. IPOCS-Lifecycle Allocation and Replenishment uses those values to calculate this exception.

- **New SKU**

This exception indicates the new items that were introduced into IPOCS-Lifecycle Allocation and Replenishment. The way IPOCS-Lifecycle Allocation and Replenishment identifies the new items is by using the assortment start date. If the assortment start date is in the future, then the item/location combinations triggers this alert. When the system reaches the assortment start date, then the item/location combinations no longer trigger the alert.

- **Recent Item Launch**

This exception keeps track of ranged item/location combinations that were recently assorted. To trigger the alert, IPOCS-Lifecycle Allocation and Replenishment uses the assortment start date plus a Recent Item Launch X Dur (weeks) parameter. If the assortment start date plus the X weeks defined in the parameter did not reach the system date, then the item/location combinations trigger the alert.

# E

## Appendix: Troubleshooting

This appendix provides details that you can use to identify and resolve problems.

### **Accessing Multiple RPASCE Applications**

A user may need to access multiple RPASCE applications, such as MFP, AP, and IPOCS-Demand Forecasting, at the same time. In this case it is necessary to launch each application URL in a separate browser window, in the following way.

Launch one application in a browser window, then launch every other application in an incognito window (Chrome) or in a private window (Firefox). Launching multiple applications using regular browser windows of the same type (for example, Chrome/Firefox) can lead to unexpected UI errors, such as logging out of one application causing a logout across all applications.