Oracle® Retail Item Planning
Administration Guide
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Preface

Customer Support

- https://metalink.oracle.com

When contacting Customer Support, please provide:

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

Note: Information contained in this document may not match your application exactly. This is due to configuration changes and customizations that may have been made for the version that you are working with.

1
Introduction

Overview

This document discusses the administration functions of Item Planning, Oracle Retail's item planning solution.

Item planning facilitates the translation of merchandise financial plans into execution level, item driven strategies to be followed throughout the life of the product. It represents the bottom up planning process, complementing and working in concert with the top-down financial plans. By providing weekly visibility to item performance and financial targets, the item planning process increases the likelihood that merchandizing strategies will be successfully executed within the financial plan parameters.

The following benefits are realized by item level planning:

- Quantified financial plans
- Unified financial and item strategies
- Company wide focus and standards for key item performance
- Proactive rather than reactive approach towards business trends
- More efficient use of inventory
- Reduced markdowns
- Increased profits
- Increased return on investment

The key features found in Item Planning, Oracle Retail's item planning solution, are:

- Item/Channel/Week planning
- Multi channel support
- Unit plans converted into values
- Reconciliation to financial targets
- Pre and in season workflow process support
- Item demand forecast
- Alternate key item plus traditional planning hierarchies
- View to weekly marketing strategy for each item
- Promotional sales planning
- Like item functionality
- Placeholder functionality
- Flexible key item definition
- Self approval process
- Robust planning and assessment measure set

Audience and Purpose

The Item Planning administrator controls the user role definition and security that in turn control the functions a user may perform.

This document is written for persons who have administration responsibility for Item Planning. It contains general procedures for controlling functions, such as:

- Adding and deleting users and groups
- Assigning and maintaining access to application components (workbooks, worksheets, measures)
- Seeding and loading data

It is assumed that administrators have a general knowledge of the Oracle Retail Predictive Application Server (RPAS) and basic Item Planning end-user functions.

Related Documentation

For end-user features and functions of the Oracle Retail Predictive Application Server (RPAS) and Item Planning, refer to the following documents:

- RPAS User Guide and online help
- Item Planning User Guide

Solution versus RPAS Administration

Administration functions are grouped into two categories:

- Solution administration
- RPAS administration.

The solution administration functions apply to the specific solution, Item Planning.

The Item Planning-specific administration function includes:

- **Seeding Administration** – used to copy data from a selected plan version to the working plan version prior to start the Pre-Season plan.

RPAS administration consists of the following activities:

- **User and Group Management** – used to add, delete, and modify users, and to add and delete user groups.
- **Security Management** – used to provide access to workbook templates, measures, hierarchies, and dimensions.

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Item Planning Administration

Overview

Item Planning Administration consists of one workbook that allows the administrator to perform the following activities:

- **Seeding Administration workbook** – Seeds the working item plans with data from a selected version.

Seeding Administration Workbook

The Seeding Administration workbook allows users that have administration access to seed the Wp plan version with data selected from an alternate plan version. This process is typically done at the beginning of a Pre-Season planning period. Data for pre-defined measures are copied from the selected plan version to those same measures for the Wp plan version.

- Data are seeded from one product to that same product from one year to the next. Item Planning does not currently allow users to seed data across different classes.
- The user must select the classes, channels, and time periods that are to be seeded at the time the Seeding Administration workbook is built.

Seeding Process

Create a Seeding Administration Workbook

1. Click **New** on the toolbar. The New dialog box is displayed.
2. Click the Item Planning tab.
3. Select 5 ─ Seeding Administration, and click **OK**. The Seeding Administration wizard is displayed.
4. Select the desired channels, products, and time periods on the respective pages of the wizard.
5. Click **Finish**. The Seeding Administration workbook is created.

Set up the Source Data

1. Select the Source Setup tab to display the Source Setup worksheet.
2. For each Product, select the plan version from which the data is to be copied into the Wp. Different sources may be selected for different time periods and for different products.

   The available plan versions are:

   - Ly – Last year data
   - Ly Op – Last year, original plan data
   - Ly Cp – Last year, current plan data
3. Once the selections are made, click **Calculate**. This replicates the selections to lower hierarchy dimension members.
4. From the main menu, select the Seeding Administration > Seed. A message will display that indicates the successful completion of the seeding process.

   Note: This process automatically commits the data to the database.

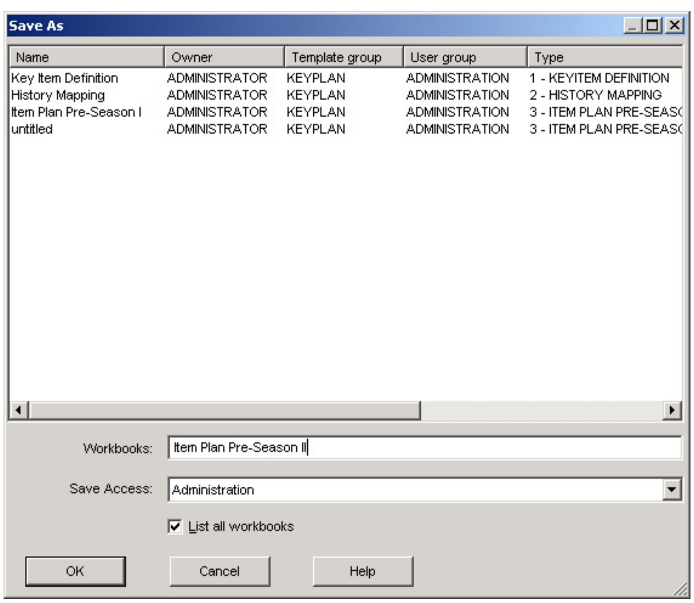
Review the Results of Seeding

1. Select the Seeding Results tab to review the Seeding Results worksheet. The measures for the first product are displayed.
2. Scroll through the list of classes to view the seeded data.
3. Repeat the seeding process if necessary.

Save a Workbook

You can save a newly created workbook at any point in the planning process and open it later to complete the planning process or edit previous steps. This action also allows the flexibility to revise your plan continuously as new information comes in.

1. Select File > Save from the main menu. The Save As dialog is displayed.



The column fields in the list box describe existing plans:

- **Name:** Name of plan
- **Owner:** Administration or user
- **Template Group:** Template Name
- **User Group:** Work group of the plan originator
- **Type:** Type of workbook
- **Date:** Date of origination
- **Access:** User (originator), world or group access

The Save As window displays previously saved workbooks. The first field is blank. When you enter a name for this workbook, it will be displayed in the list of workbooks that can be viewed or edited. This workbook name is displayed on the title line when the workbook is open for further build or editing procedures.

2. Enter an identifying name in the top Workbooks field.
3. In the Save Access As section, select User, World, or Group. Selecting Group allows other users within your group to view or edit your workbook. Selecting User allows only the plan originator to view or edit this workbook. Once selected, it cannot be changed.
4. If you want all workbooks from your group to be displayed for viewing or editing, select the List All Workbooks check box. If this check box is cleared, you will only see the workbooks created by you as Owner.
5. Click **OK**. The parameters of this workbook are saved and the workbook structure is available for continued planning or for access at another time. The Step 1 window is still displayed.

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User Administration and Security

User administration and security setup involves the following tasks:

- Set up users and administrators
- Set up user groups
- Set up user access to workbooks, measures, hierarchies, and dimensions
- Set up optional measures for workbooks

Set up Users and User Groups

User administration is the process by which administrators add, edit, and/or delete authorized system users, add and/or delete user groups, and change user passwords. These tasks are performed using wizards that are accessed via the User Administration tab.

The following is a collection of standard procedures performed from the User Administration tab:

- Add a user (system user or administrator)
- Add a user group
- Delete a user
- Delete a user group
- Edit a user

Add a User

1. Click **New** on the toolbar. The New dialog box is displayed.
2. Click the User Administration tab.
3. Select Add User, and click **OK**. The Add User wizard is displayed.
4. In the User Name field, type the ID string that the user will enter when logging on to the system.

> **Note:** Each user name must begin with a letter, must contain no spaces (the underscore character is acceptable), and must not exceed eight characters in length.

5. In the User Label field, enter a description for the user ID (for example, the user's full name). This identifying label will appear in various locations throughout the application. For example, labels appear on the File > Open dialog box to identify the owner of a given workbook.
6. Select the user group to which the user belongs. User groups must be created before users can be assigned to them. If a user is to be assigned to a group that does not yet exist, you must exit from this wizard to first create the new user group.
7. In the Password field, enter a password for the user.
8. In the Password Verification field, enter the same password as entered in the Password field.

9. If the user should have Administrator status, which allows that user to create system-wide default styles for workbook templates, select the Administrator check box.

   Note: Administrator status enables users to perform the Format menu option Save Format/Admin, which creates new system-wide default styles for workbook templates. If you are not sure whether a user should be granted this ability, you can change the user's Administrator status later.

10. If the password is an initial password that must be changed by the user when they log in for the first time, select the Force Password Change check box.
11. To prevent the user ID from being used to log in to the system, select the Lock User Account check box. The user ID will not allow access to the domain.
12. Click **Finish**.
13. When prompted to acknowledge the addition, click **OK**.

    You can now assign workbook template and measure access rights to the user.

Add a User Group

User groups provide an intermediate level of security to workbooks created and saved by specific users. When you assign new users to the system, they must be assigned to existing user groups. User groups generally consist of individuals with similar job functions or responsibilities; that is, the user group corresponds to the user's role in the planning process.

1. Click **New** on the toolbar. The New dialog box is displayed.
2. Click the User Administration tab.
3. Select Add User Group, and click **OK**. The Add User Group wizard is displayed.
4. In the Group Name field, enter the ID of the user group.
5. In the Group Label field, enter a label describing the user group. This identifying label will appear in various locations throughout the application.
6. Click **Finish**.
7. When prompted to acknowledge the addition, click **OK**.

Delete a User

To maintain system security, delete user profiles that are no longer needed.

1. Click **New** on the toolbar. The New dialog box is displayed.
2. Click the User Administration tab.
3. Select Delete User, and click **OK**. The Delete User wizard is displayed.
4. Select a user from the Users list.
5. Click **Finish**.
6. When prompted to acknowledge the deletion, click **OK**.

Delete a User Group

If a user group no longer exists, you should delete the group from the system as soon as possible to maintain system security.

> **Note:** Deleting a user group will remove every user in that group.

1. Click **New** on the toolbar. The New dialog box is displayed.
2. Click the User Administration tab.
3. Select Delete User Group, and click **OK**. The Delete User Group wizard is displayed.
4. Select a user group from the User Groups list.
5. Click **Finish**.
6. When prompted to acknowledge the deletion, click **OK**.

Edit a User

1. Click **New** on the toolbar. The New dialog box is displayed.
2. Click the User Administration tab.
3. Select Edit User, and click **OK**. The Edit User wizard is displayed.
4. In the User IDs field, select a user label, and click **Next**.
5. On the next page of the wizard, edit the enabled fields as necessary.
6. Click **Finish**.
7. When prompted to acknowledge the edits, click **OK**.

Set up User Access to Workbooks and Measures

After users and user groups are created, you may set up and maintain access permissions to workbook templates and measures within those workbook templates. That is, you can determine which templates individual users can access, as well as the measures that users can access while manipulating workbooks in the system. Additionally, you can specify and restrict the measures that are available to be added to a given workbook template. The ability to set access permissions in this way provides a high degree of measure security, as users can be restricted to viewing and editing only certain relevant measures.

User access to workbooks and measures is controlled through the Security Administration Workbook. Using this workbook, you can:

- Assign and modify the access rights of each user to all workbook templates. User/template permissions are set in the Workbook Template Rights worksheet.
- Assign and restrict user access to individual measures. User/measure permissions are established in the Measure Rights worksheet.
- Determine which optional measures are accessible through individual workbook templates. Template/measure permissions are set in the Workbook Template Measure Rights worksheet.
- Set hierarchy permissions in the Hierarchy Modification Rights worksheet.
- Set dimension permissions in the Dimension Modification Rights worksheet.

Set or Modify User Access to Workbook Templates

1. Click **New** on the toolbar. The New dialog box is displayed.
2. Click on the Administration tab.
3. Select Security Administration, and click **OK**.
4. On the Workbook Template Rights worksheet, select each template for which a user needs access rights. For templates to which a user should not have access rights, make sure there is no check mark.
5. To save the workbook, click **Save** on the toolbar. If the workbook was not previously saved, the Save As dialog box is displayed. Enter a name for the workbook and the level at which it should be saved. Then click **OK**.
6. From the File menu, select Commit Now. Changes must be committed to the master database for them to take effect.
7. When prompted to acknowledge the action, click **OK**.
8. To close the workbook, click **Close** on the toolbar.

Assign or Restrict User Access to Measures

1. Click **New** on the toolbar. The New dialog box is displayed.
2. Click on the Administration tab.
3. Select Security Administration, and click **OK**.
4. On the Measure Rights worksheet, indicate whether the user should have Read Only or Read/Write access to each measure. The default permission is Denied.
5. To save the workbook, click **Save** on the toolbar. If the workbook was not previously saved, the Save As dialog box is displayed. Enter a name for the workbook and the level at which it should be saved.
6. Click **OK**.
7. From the File menu, select Commit Now. Changes must be committed to the master database for them to take effect.
8. When prompted to acknowledge the action, click **OK**.
9. To close the workbook, click **Close** on the toolbar.

Set Measure Availability for Workbook Templates

1. Click **New** on the toolbar. The New dialog box is displayed.
2. Click on the Administration tab.
3. Select Security Administration, and click **OK**.
4. On the Workbook Template Measure Rights worksheet, select each measure to be included in a workbook template. For measures that are not included in a workbook template, make sure there is no check mark.
5. To save the workbook, click **Save** on the toolbar. If the workbook was not previously saved, the Save As dialog box is displayed. Enter a name for the workbook and the level at which it should be saved. Then click **OK**.
6. To commit any changes, select Commit Now from the File menu. Changes must be committed to the master database for them to take effect.
7. When prompted to acknowledge the action, click **OK**.
8. To close the workbook, click **Close** on the toolbar.

Assign or Restrict User Access to Hierarchies

1. Click **New** on the toolbar. The New dialog box is displayed.
2. Click on the Administration tab.
3. Select Security Administration, and click **OK**.
4. On the Hierarchy Modification Rights worksheet, select each hierarchy for which the user needs access rights. For hierarchies to which the user should not have access, make sure there is no check mark.
5. To save the workbook, click **Save** on the toolbar. If the workbook was not previously saved, the Save As dialog box is displayed. Enter a name for the workbook and the level at which it should be saved.
6. Click **OK**.
7. To commit any changes, select Commit Now from the File menu. Changes must be committed to the master database for them to take effect.
8. When prompted to acknowledge the action, click **OK**.
9. To close the workbook, click **Close** on the toolbar.

Assign or Restrict User Access to Dimensions

1. Click **New** on the toolbar. The New dialog box is displayed.
2. Click on the Administration tab.
3. Select Security Administration, and click **OK**.
4. On the Dimension Modification Rights worksheet, select each dimension for which the user needs access rights. For dimensions to which the user should not have access, make sure there is no check mark.
5. To save the workbook, click **Save** on the toolbar. If the workbook was not previously saved, the Save As dialog box is displayed. Enter a name for the workbook and the level at which it should be saved. Then click **OK**.
6. To commit any changes, select Commit Now from the File menu. Changes must be committed to the master database for them to take effect.
7. When prompted to acknowledge the action, click **OK**.
8. To close the workbook, click **Close** on the toolbar.