

Oracle® Retail Plan 2.6.1

Release Notes

Welcome to Oracle Retail Plan 2.6.1. The following documentation set is available with release 2.6.1:

- Oracle Retail Plan 2.6.1 Installation Guide
- Oracle Retail Plan 2.6.1 Configuration Guide
- Oracle Retail Plan 2.6.1 User Guide
- Oracle Retail Plan 2.6.1 Operations Guide
- Oracle Retail Plan 2.6.1 Administration Guide
- Oracle Retail Plan 2.6.1 Online Help

The release notes contain information on bugs that have been fixed as well as known issues that exist in this release.

New Features

Store Weights

Plan 2.6.1 supports new features for specifying store weights. Colors can now optionally use style-level like item store weights for color level forecasting. Additionally, external store weights that are derived from specified levels in the merchandise hierarchy can be used instead. This has been implemented through the UI in the Like Item screen, where the store weight option can be selected for each planned item being forecasted. If Like Stores are provided in the customer feed, they are now used automatically by the Calc Engine for store weights.

Plan supports external store weights at any level above style – subclass all the way through division.

Two properties have been added to plan.properties that are used to set the default store weights: plan.likeitem.style.store.weights.default and plan.likeitem.color.store.weights.default.

The store weights can be used in forecasting via a set of forecasting properties in the plan.properties file.

Adaptive Pack Optimization

Small stores with small, multiple deliveries in which quantities could be smaller than the smallest available pack were getting under-allocated because the pack optimization was missing some units.

In order to address this, a new property has been added to the plan.properties file. The **plan.packopt.adaptive.pack.opt** property provides a way to switch between optimizing

packs in parallel or in sequence. Setting this property to *true* (the default) enables adaptive pack opt, which optimizes packs in sequence, to incorporate pack opt results from previous deliveries into each pack opt request. This should produce more accurate results, particularly when small receipt quantities are spread over multiple deliveries. Note that this approach increases the time it takes the pack opt procedure to complete.

MicroStrategy 8

Plan 2.6.1 supports MicroStrategy 8. See the Plan Installation Guide for installation details.

Sample Dataset

Plan now comes with a standard dataset.

New install.properties Entries

New properties have been added for the Audit schema, the Merchant Desktop schema, and Merchant Desktop and User Management properties needed by Microstrategy. Details can be found in the Plan Installation Guide.

Fixed Bugs

The following Test Track issues have been addressed in the Plan 2.6.1 release.

19653 - Export to Excel from the Plan Worklist exports all the information (including information that is not currently visible from the screen) from the worklist.

19656 - To prevent unnecessary recomputation and the saving of the AP segment and the Need segment, these segments are no longer marked dirty when the item's chain-level Min constraint is changed on the Plan Worklist.

19703 - The Calc Engine now obtains store-specific future promotional lifts.

19760 - The In-Store and Out-of-Stock Date of the planned item have been added to the Pricing Plan screen.

19767 - DC Flow dates are no longer different before and after saving. This had been occurring only when the segment was invalid or empty. Note that even though this bug has been fixed, other scenarios may cause the same event to occur. See TT 21058.

19768 - Instead of calculating the total receipts for the style as the sum of the total receipts for the colors, the Assortment View now calculates the total receipts for the style by summing row by row.

19769 - The Item Selector now displays Planned Item's Hierarchy Info (as read only).

19782 - Apply Mins now allows selection, instead of applying to the entire assortment. The selection can be any combination of style and color.

19783 - The summary row at the top of the Item View always appears at the top of the screen so that the assortment total is always visible when users scroll down to the other months in their plan. This change involved an update to the item_plan_grid.xml file.

19804 - The IMU percent on the Like Item screen now displays as a percent. This was implemented through a change to plan-column-list.xml.

19809 - Multiple filters now work on the Plan Library (Customize Table).

19811 - A forecast is marked as invalid when the hierarchy changes in Item Validation.

19921 - External Store Weights have been implemented as a new feature.

20314 - When an error occurs during the creation of the Need and AP segments after re-forecasting (that is, due to missing transit times), then the forecast status is "Failed" and a reason is provided for the failure. Previously, the forecast status was "Complete" but an error message was displayed when a user attempted to view in Item View.

20431 - Item View has been changed so that BOH/EOH metrics are calculated for an item's lifecycle. For LILY, lifecycle is retrieved based on aggregation dates, and a warning is displayed if aggregation dates are outside the viewable area.

20491 - It is now possible to open a third plan after adding additional colors to a style with colors that are already carried over across three plans.

20515 - Changing the Like Item mapping from style to color and then copying Need to AP now works correctly.

20522 - Selecting a product group to navigate to the Item View no longer produces a system error.

20670 - The RDM refresh now publishes the AP Status to the RDM. This allows the Allocation and PO Reports to be filtered to display data for submitted items only.

20671 - An item cannot be actualized if the item type is changed and the flow dates are no longer valid. In addition, an item cannot carry over if it has a blank OOS date and it is not allowed to, per the plan.flow.dates.item.types.oos.not.required.plan.property.setting.

If an item has both B and F colors and a user wants the Basic colors to have a blank OOS date, then the user should set the OOS date to <blank> for the Basic color(s) and set an OOS date at the style as a catchall for the Fashion colors.

20757 - In the Item by Time Report, the data now matches the Plan. Changes were made to the Total MD% and GP% metrics. The column types on rdm_plan_company_budgets_Tbl were also changed.

20758 - Mock Styles and Colors now appear in MD Reports, with one exception, which is discussed in the Known Issues section under TT 21095.

20764 - The DataSource report at the color level displays data for all styles that are forecasted at the color level or that have AP quantities defined at the color level.

20767 - The RDM refresh now publishes the AP status to the RDM. This allows the Allocation and PO Reports to be filtered to display data for submitted items only.

20774 - Adaptive Pack Optimization has been implemented as a new feature.

20802 - Changes have been made to install.properties. Properties for the min and max number of connections for desktopDB schema have been added.

20820 - The DC receipts in the Item View for any style with only one color no longer have doubled receipts.

20826 - When Plan and Place are installed in one environment, an upgrade to Plan can be successfully installed without dropping all Place-specific views from the database.

20931 - The need segment at the color level is now generated when going from style-level forecast to color-level forecast in a clustered environment.

20932 - A new function (getbasepromolift) has been created that allows the Calc Engine to get corporate promo lifts.

21008 - WebUniversal can be accessed through Merchant Desktop on MicroStrategy 8.

Note that when specifying the mstr.admin.server setting in install.properties:

For an MS7 install - use the IP address only.

For an MS8 install - use either the IP address or the fully qualified hostname. If the hostname is specified, it is recommended that it be all CAPS. For example:
HOSTNAME.US.ORACLE.COM

21068 - Sales U are now copying properly from Need to AP when there are varying color-level flow dates (that is, if one color starts later and ends later than another).

21092 - Aggregation now works correctly for the following metrics in the LILY segment: PERMANENT_MARKDOWN_DOLLARS, POS_MARKDOWN_DOLLARS, GROSS_PROFIT_DOLLARS, NUM_SELLING_WEEKS, PRICING_STATUS, CURRENT_PERMANENT_PRICE, POS_MARKDOWN_SALES_UNITS, POS_MARKDOWN_SALES_DOLLARS, and PERM_MARKDOWN_SALES_UNITS.

Known Issues

Following is a list of known issues in this release and the workaround, if it is available:

17805 - Deploying the application over an existing installation causes the Installer to fail.

17976 - Changing the aggregation dates changes the forecast status from Complete to Invalid. The forecast is unnecessarily re-run.

19761 - The formula for GP% for LILY has been changed to $\text{gross_profit_dollars} / \text{sales_dollars} * 100.0$ for both weekly and monthly calculations. However, when the user is viewing a style that is a rollup of colors (that is, when the Like Item mapping is at the color level) or viewing multiple styles in the item View, then the GP% will appear incorrect.

20127 - With MicroStrategy 8, reports are not returning the correct data. The metadata needs to be modified after upgrading the project to Microstrategy 8.

20186 - The NEED data published by RDM refresh for the lifecycle of the item is based on the NEED store base for the plan being published, as opposed to the need storebase of the plan associated with the particular week being published.

20250 - If a Plan or a Planned Item is deleted, the entire lifecycle from RDM is deleted, even if the item still exists in another plan.

The workaround is to run RDM Publish from the Plans in which the item still exists.

20259 - The AP segment is not properly displayed if APS quantities are set a different levels across plans. APS quantities should be set at the same level (Color or Style) for the duration of its lifecycle.

20457 - For a newly added carry over item, store base selections in the first plan are not accurately carried to the subsequent plan(s) when the third plan is opened before the second plan, resulting in an exception in various screens.

20980 - In the sample dataset, a plan cannot be created for the following department and plan period (due to missing budget data): Division 1, Group 110, Department 1101, Year 2007, Period Dec - Nov.

21058 - DC Flow dates change after a save when buy parameters (like Like Item) that change forecast are changed, and then a recalculation and save is done in DC Flow. See TT 19767.

21062 - The Calc Engine property "delphi.useExternalStoreWeightsAsFallback" should be set to false (which is the default). The use of external store weights as a fallback when dynamically calculating internal store weights for stores with no historical sales is not supported. The Calc Engine will continue to use a store budget.

21084 - When the time period is extend in Item View, the period being displayed is persisted in the User session and applied to subsequent visits to the Item View. As a result, it is possible for a user to get a system error when accessing the Item View, if the user accesses it after extending the time period in another plan, when the persisted time period does not overlap with the current item's life cycle. The workaround is to log out and log back in to the application. This clears out the persisted time period.

21095 - When an actualized style contains both mock and actual colors, the mock colors will not be correctly published to the RDM and the data for those colors will not be available in the Merchant Desktop reports.

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