

Oracle® Retail Plan 2.6.2

Release Notes

Welcome to Oracle Retail Plan 2.6.2. The following documentation set is available with release 2.6.2:

- Oracle Retail Plan 2.6.2 Installation Guide
- Oracle Retail Plan 2.6.2 Configuration Guide
- Oracle Retail Plan 2.6.2 User Guide
- Oracle Retail Plan 2.6.2 Operations Guide
- Oracle Retail Plan 2.6.2 Administration Guide
- Oracle Retail Plan 2.6.2 Online Help

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

Upgrade Procedures

The sections below contain important instructions for completing the upgrade to Plan 2.6.2

Additional Plan Upgrade Procedures

After upgrading to Plan 2.6.2, there are two procedures that should be run:

- Patch ELM_520 must be manually applied after the upgrade, before running the weekly sales load, to ensure the BOH\$ fix (21487) is correctly applied for future sales loads. This patch is not executed by the upgrade process.
To apply this patch:
 1. CD to <installbase>
/modules/Database/ELMSchema/install/oracle/ELMSchema/patches
 2. Log in to Actual History schema via SQLPlus: sqlplus
<elmuser> /<elmpasswd> @<elmDB>
 3. Execute the script: sql > @ELM_520.sql
- There is a second procedure to clean up BOH\$ for all existing weeks of sales history in the database. The details of this procedure will be provided separately, and will take a long time to execute.

Additional Plan/Place Upgrade Procedure

If you are upgrading to Plan 2.6.2 in an environment currently running Plan 2.6.0 and Place 12.0, the pvm registry file must be renamed prior to running the upgrade, in order to avoid version compatibility conflicts:

To rename the registry file:

1. CD to <installbase>/config/.PVM
2. mv pvm-registry.xml pvm-registry.xml.bak

Note: This limitation will be resolved in the next release of Place.

Application Schema differences reported by the installer when upgrading Plan or Place in a co-deployed environment can be ignored.

New Features

The following features were added to Plan for the 2.6.2 release.

Editable AP Sales

Plan 2.6.2 gives you the ability to manually override the sales curve in cases where you do not agree with the calculated results. The Editable Active Plan Sales Percentage feature will provide you more control by allowing adjustment of the chain level shape of the sales curve.

Revert AP to LSP

Plan 2.6.2 supports a Revert the Active Plan to the Last Submitted Plan function.

The Revert AP to LSP function allows you to revert the AP units of the selected item to its LSP units. This action is typically performed to add colors to previously submitted style. It provides the ability to work on newly added color(s) to a submitted style.

See the Plan 2.6.2 User Guide for complete information on this new function.

Advanced Like Item Find

Plan 2.6.2 adds all the levels between department and style to the Add Like Item - Expert Find screen. These additional levels allow you to reduce the scope of the query, decreasing the number of returned items as well as increasing query performance.

Generic Like Items

Generic Like Items are now available in Plan 2.6.2. Averages can now be generated at hierarchy levels below the Planning Level. For example, if you want to generate a Class level Generic Like Item then you must select the particular Class in the Add Like Item screen Expert Find and select the Include Generic Like Item checkbox. The first record in the search results will be the Class Average Like Item.

Implementation Details:

- The Generic Like Item must be the only Like Item mapped to a given Planned Item. Weighting a generic Like Item against other individual Like Items is not supported.

- Generic Like Items use a flat PLC when generating a forecast.
- The default Forecast Start Date for a Generic Like Item is 12 months before the in-store date of the Planned Item.
- Currently Like Generic forecasts are calculated by the Analytical Engine based on “Average Color”; however, the Plan application only supports mapping Generic Like Items at the style level. If the Like Item Scale is set to the default (100), the result will be a lower-than-expected forecast.

The workaround is to scale the Like Item up by the number of planned colors when mapping to a generic like item.

Weblogic 8.1 sp6

Plan 2.6.2 now supports Weblogic 8.1 sp6.

MicroStrategy 8 Support

Plan 2.6.2 supports MicroStrategy 8. See the Plan Installation Guide for installation details.

Upgrading from MS7 to MS8

During a MicroStrategy install, when specifying the mstr.admin.server setting in your 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 it be all CAPS, for example:
HOSTNAME.US.ORACLE.COM

The following must also be set prior to installation if integrating with a MicroStrategy 8 I-server:

- In install.properties, set:
bi.server=MS8
- After installing the RMI Server (refer to installation guide for more details), change the following property in the file “rmiserver.properties” located in the installation directory for the RMI server on the MicroStrategy server:
bi.server=MS8

If you are migrating an existing project from a MicroStrategy 7 I-server to a MicroStrategy 8 I-server, follow the steps below to migrate your metadata to the MS 8 server.

1. On the MS7 Server, create a system date source (through ODBC Data Source Administrator), pointing at a new/existing MDB file.
2. In MicroStrategy Desktop, create a new Direct Project Source pointing at the Data Source created in step 1.
3. Duplicate the Project you’d like to migrate from the MS7 I-server into the Project Source created in step 2.
4. Once the duplication is complete, copy the MDB file to the system running the MS8 Intelligence Server.

5. On the MS8 Server, create a System Data Source pointing at this MDB file, and create a Direct Project Source pointing at this newly created Data Source (as in steps 1 and 2 above).
6. Duplicate the project from the Project Source created in step 5, into the MS8 I-Server Project Source.
7. Once duplication is complete, open the I-Server Project and click Yes when prompted to upgrade the Project. The upgrade will take a few minutes.

If you are using the metadata provided with Plan 2.6.2, follow the steps below to update the product metadata to MS8. These instructions assume you have installed and configured the MicroStrategy 8 Intelligence server.

1. Copy the MDPlanMetadata.zip file from
<Install>/modules/Database/TEAKSchema/install/oracle/TEAKSchema to the MS8 Server.
2. Extract the PlanRDMMetadata.mdb file from the Zip file.
3. Follow steps 5-7 above. The project delivered with the CD Image in the MDB file is version 7, so it will need to be upgraded to work on MS8.

Fixed Defects

The following issues have been addressed in the Plan 2.6.2 release.

16774 - The Count metrics for Style/Color are now correct in the ACT/OPT Financial View Reports. It is necessary to include Style or Color as an attribute in the reports in order for this count to be correct.

19336 - Edited Receipt % are now deleted after a Copy Need to AP followed by segment recalculation.

19761 - LILY GP% is now correct. This was resolved as part of the fix for defect 21092. See 21092 for more details.

19762 - A Style Count column has been added to the Plan Library.

19770 - Additional search levels added to expert find function. Now levels between the Planning level and Style can be selected for searching. The lowest search level can be configured via the plan.properties entry lowest.plan.search.level= (The default setting is SUB-CLASS).

19777 - Item view LILY reflects the total for the style, even if multiple colors are used in the weighting. The LILY calculations take into account the relative weights of each color as specified in the like item screen:

If a color C is mapped to two like colors, c1 and c2, with weights w1 and w2, then the LILY for C is equal to (LILY for c1) * w1 + (LILY for c2) * w2. The LILY for C is a weighted combination of the LILY for c1 and for c2.

For Store Count, the weighted combination formula above is not applied. LILY Store Count for C is the minimum of the non-zero store counts of c1 and c2.

There are other metrics that are derived metrics such as Gross Profit Percent. Such metrics will not be calculated as a weighted combination. They derive their value just as they regularly do.

19795 - Added Client Id and Description to the headers of the What-if and Add Like Item screens.

20457 - A newly added carryover item no longer causes an exception error in cases where a later carryover plan is opened before an earlier plan. Store base selections are now accurately carried over to subsequent plans.

20500 - New colors added to carryover items will now cause the Pack-Opt flag to be cleared.

20536 - Editable Active Plan Sales % added as a feature.

20552, 20665 - Style-level “# of Stores” metric in LILY now calculated as the minimum of the non-zero store counts of the style's colors

20953 - The application now handles cases where stores are made ineligible for some months within a plan. Previously additions or subtractions to the Plan_Budgets_tbl were not happening, resulting in incorrect budget information displayed in the Plan application.

21008 - During a MicroStrategy install, when specifying the mstr.admin.server setting in your 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 it be all CAPS, for example:
HOSTNAME.US.ORACLE.COM

21058 - DC Flow dates are no longer different before and after saving.

21084 - There will not longer be an exception error when Item View is accessed after extending the time period on another plan where the dates don't overlap with the lifecycle dates of the item you are trying to view.

21095 - Mock colors associated with actualized styles are now correctly published to the RDM.

21096 - Editing AP receipt %'s, and then moving the in-store date forward no longer produces orphan receipts in weeks before the new in-store date

21181 - Plan will now support Like Generic Items (Averages Items) at levels from the planning level (Department) on down. What this means now is that Like Generic Items can be used in a forecast for the Department, Sub-Department, Class and Sub-Class.

21245 - The LSDMapper was re-optimized to handle an increase in data volume.

21298 - A query was timing out making it impossible to create plans for large departments. The query was fixed.

21332 - Queries were optimized to reduce the time needed to load sales data.

21336 - Pack Opt now gives reasonable results for items with many colors, styles, and stores.

21353 - A calc engine issue was fixed that was causing forecast failures for carryover items with long life cycles.

21354 - AP Sales will now calculate correctly when adjusting to AP Receipts, in cases where there are stores with Need of 0.

21379 - Copy Need to AP is now working properly. Previously need was not copying to a second plan after buy parameters were changed. There are some scenarios where AP sales will not equal Need Sales after running Copy Need to AP:

- Copying Need to AP in the second plan without first copying Need to AP in the first plan.

- 21678 - PLC Scale was being calculated incorrectly for Like Generic forecasts**

Workaround:

- Add type of 'M' to the planned_item_types_tbl. Insert into planned_item_types_tbl values ('M', 'Mixed')
- Add “plan.planneditem.product.type.M=M” to the GridResources.properties file in <install>/config/plan/client directory.

20882 - Store AP Quantities can change when a store shifts from one VG to another.

20980 - One department in sample date causes an error when creating plans: division 1, group 110, department 1101, year 2007, period Dec. - Nov.

21051 - Changing Like Item mapping from Style to Color for an already forecasted item, and clicking What If or Recalculate in the DC Flow screen results in a forecast error.

21090 - Increasing the lifecycle duration for a Submitted item results in a forecast failure.

Workaround : Set Item Status to "Changed" prior to changing the Store Flow dates.

21237 - Running What if after initially setting all buy parameters but without saving gives “Store list not allowed” error.

21412 - EOH\$ differs between the Item by Time report for AP/Need and the Item View. EOH\$ in the reports is currently calculated as LTD Receipts - LTD Sales. This is a different calculation than the application (EOH units * Current Retail \$), and results in differences between Reports and the application, particularly in weeks after a Markdown has occurred.

21481 - In-Store dates for Planned Items must be on a Sunday, otherwise, total receipts and sales may not match in all views

21542 - When stores are made ineligible for a Plan, yet there are already submitted items in that plan, the store remains in the Plan. As a result, the user can plan AP quantities for other items for that ineligible store. This will result in a Pack Opt failure due to missing Size Profile information for that store.

Workarounds:

- Change all submitted items to 'Changed' Status - which will result in the store being removed from the Plan.
- Identify the ineligible store and ensure that AP quantity for that store is set to 0 for all planned items prior to pack opt.

21648 - LSP totals do not agree between Assortment View and Item View when a store is made ineligible for a plan. Item View displays LSP data for the deleted stores, but the Assortment view does not.

21685 - Copy Need to AP doesn't work properly after AP was first copied from LSP and LSP had a longer lifecycle.

21701 - Revert AP to LSP recalculating DC receipts instead of copying LSP DC receipts. This will generally be OK, but will result in a discrepancy between AP and LSP DC receipts if inputs into the DC Flow calculation (max # of deliveries, transit time, etc.) have changed.

21706 - PO Report date prompts are based on the store receipt date, as opposed to the DC Receipt date. This can result in unexpected data in the PO Report when using date prompts

21711 - The Sales and Receipt Financial plans are blank on the Budget Reconciliation report when weekly prompts are specified. The weekly prompts should be removed from this report

21739 - When a store is deleted in a plan that already has a submitted item, a store's size profile is gone but the store itself remains in the plan (due to the submitted item). Running a pack opt on another item fails with an exception (see 21542). The failed pack opt appears to clear AP quantities for this store. However, re-running the pack opt still fails with the same exception even though there are no AP quantities for the store.

Workaround: Manually enter AP quantities for the store, save the view, manually zero out the quantities, then save. Run the pack opt.

21783 - The department level like items search can take as long as 4 minutes for large plans

Workaround: Search for like items at lower levels.

21820 - With carryover item, DC flow not being recomputed if item is submitted in one plan.

Workaround: Change the first planned item to Changed status, and force the AP segment to recalculate, then Revert AP to LSP and submit again.

21823 - Editing sales % in a second plan bumps up the receipts for the submitted carryover item in the first plan.

21843 - Deleting a color from a previously pack-opted item, and then submitting (without changing anything else) doesn't remove the color from PO/Alloc reports. Deleting a color does not automatically clear the Pack Opt flag, so it is possible to resubmit without re-running pack opt.

Workaround: Clear the Pack Opt flag in some other way (such as re-forecasting, copying Need to AP, modifying APS), and then re-run pack opt.

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