Oracle® Retail Plan

Release Notes

Release 12.2.2

March 2009

Welcome to Oracle® Retail Plan Release 12.2.2.

This document highlights the enhancements and fixed defects included in this release. It also describes how you can upgrade to this release. It includes the following sections:

- What's New in this Release
- Upgrading to Plan Release 12.2.2
- Fixed Defects
- Known Issues
- Oracle Retail Documentation on the Oracle Technology Network
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What's New in this Release

The following enhancements have been included in Plan Release 12.2.2:

- Additional Plan Updater Arguments (27137)
- Reflowing Need Receipts Feature (27530)
- Updates to delphi.properties File (27751)

Additional Plan Updater Arguments (27137)

Carryover Items are now considered as items that have a planned lifecycle across multiple Plan periods. They will not carryover into the next plan only because of the fact they had an actual OH, planned Sales, or receipts in the future. The Plan Updater process has been modified to include the following additional arguments that provide you the ability to delete the items that may have unnecessarily got carried over to the next plan period:

- *-operation=itemDelete* – When run with this option, the Plan Updater process will only delete the faulty carry over items and terminate.
- *-operation=ALL* – When run with this option, the Plan Updater process will first delete all the faulty carry over items and then proceed with the usual Plan-level, item-level, and RDM updates.

> **Note:** You must add the relevant Plan Updater argument to the list as the first option in the existing batch configuration.

When the Plan Updater is run without both these arguments, the faulty carry over items will not be deleted.

The PlanUpdater.properties file also includes the following new parameters that help configure the delete process:

- *planupdater.item.delete.minItems* – This parameter defines the number of items that each thread must delete. It has been currently configured to 2. A higher value may lead to transaction time out errors as each thread only has 200 seconds to delete all the items it was assigned.
- *planupdater.itemdeletemaxseconds* – This parameter defines the maximum wait time for the threads during the delete process. The default (recommended) value is 600 seconds.

Reflowing Need Receipts Feature (27530)

The Need receipts are now reflowed based on the AP DC segment to meet the future sales (including safety stock and presentation minimum) and avoid the negative EOH units at all times in the plan. Amounts that get reconciled in a DC shipment will now get added to the first future week of the next DC shipment

When the Need type is Constrained, the Need Receipts are constrained to the available DC Receipts. In case the Need Receipts are higher than the confirmed DC Shipments, they will be moved to the next possible receipt-week as per the defined delivery cadence. This will ensure that the Need Receipts can directly be copied to the Plan (AP).

When the Need type is Unconstrained, Need Receipts will be based only on the delivery cadence and lifecycle dates, assuming that sufficient DC Receipts will be available immediately.

Updates to delphi.properties File (27751)

The *delphi.properties* file now includes a new parameter and additional configuration changes as part of the fix for Issue 27751. To prevent the stores with low inventory from being filtered out of the store weight calculation, the following parameter has been introduced in the *delphi.properties* file:

- *delphi.store.weight.threshold*

  Ensure that the value for this parameter to **0.0**, to avoid filtering out store weeks with low inventory.

Also, you must uncomment the following parameters and set the relevant values:

- *delphi.destore.shiftedTabPlc* – Activates the destoring for the Shifted PLC.

  Set the value to *true*.

- *delphi.shiftedTabPLC.movingAvg* – Minimizes the smoothing for the Shifted PLC.

  Set the value to *{0.1,1,0.1}*.

For more information on the *delphi.properties* file, refer to the *Oracle Retail Plan Configuration Guide*.

Upgrading to Plan Release 12.2.2

Once you obtain the installation media, you must first set up the installation properties file for the upgrade, and then launch the Oracle Retail Installer. This section describes the steps you must use to upgrade to the Plan Release 12.2.2. It also lists the properties you must set for the upgrade.

> **Note:** This release contains the files that were added or updated since Oracle Retail Plan Release 12.1.7 or 12.2.1. Before you upgrade to this release, ensure that you have the Plan Release 12.1.7 or 12.2.1 and all previous patches installed.

To upgrade to Plan Release 12.2.2:

> **Important:** Before you start the upgrade, Oracle recommends that you back up the existing database.

1. In the Plan installation folder, set up the following parameters in the *install.properties* file:

Table 1 Set Up Parameters

Parameter	Value
Audit Schema Properties	
database.auditdb.oracle.create	no
database.auditdb.oracle.upgrade	yes
Common (Main) Schema Properties	
database.commondb.oracle.create	no
database.commondb.oracle.upgrade	yes
Place Schema Properties	
database.placedb.oracle.create	no
database.placedb.oracle.upgrade	yes
Plan Schema Properties	
database.plandb.oracle.create	no
database.plandb.oracle.upgrade	yes
ELM Schema Properties	
database.elmdb.oracle.create	no
database.elmdb.oracle.upgrade	yes
RDM Schema Properties	
database.rdmdb.oracle.create	no
database.rdmdb.oracle.upgrade	yes
OPT Schema Properties	
database.dogwooddb.oracle.create	no

Table 1 (Cont.) Set Up Parameters

Parameter	Value
database.dogwooddb.oracle.upgrade	yes
Merchant Desktop Schema Properties	
database.desktopdb.oracle.create	no
database.desktopdb.oracle.upgrade	yes

2. Launch the upgrade process in one of the following modes:
   - Silent mode (non GUI)

     To run the upgrade in the Silent mode, run the following command:

     ```
     bash install.sh -s -p <path-to-install.properties>
     ```

   - Graphical mode (using the Oracle installer)

     To run the upgrade in the Graphical mode, run the following command:

     ```
     bash install.sh
     ```

3. Once the installation is complete, restart the WebLogic server for the changes to take effect.

   For more information on the install.properties parameters or the installation commands, refer to the chapter *Installing Plan* in the *Oracle Retail Plan Installation Guide*.

4. Complete the upgrade process by running the following bulk update processes:
   a. *{Optional}* Log on to the **PLAN** database schema and run the **patch_confirmed_DC_extended.sql** script in case you want to auto-confirm the DC receipts for styles with *Changed* status. You can find the script at the following location in the Plan installation directory:

      ```
      <Plan_CDImage>/Database/PLANSchema/install/oracle/PLANSchema/patches/
      ```

   b. In the **PLAN** database schema, run the **fix_future_ap_receipts.sql** script to execute the Future AP receipts calculation algorithm. You can find the SQL script at the following location in the Plan installation directory:

      ```
      <Plan_CDImage>/Database/PLANSchema/install/oracle/PLANSchema/patches/
      ```

   c. Run the **flow_param_null_fix.sql** script to identify and fix items that may cause the Plan Updater to fail with an "calcParams argument is null" exception. You can find the SQL script at the following location in the Plan installation directory:

      ```
      <Plan_CDImage>/Database/PLANSchema/install/oracle/PLANSchema/patches/
      ```

      Important: You must also include this script to run before the Plan Updater step in the batch schedule set up for your implementation.

d. Log on to the **ACT** database schema (logically called, ELM schema) and run the **populate_hd_chain_colors_tbl.sql** script. You can find the script at the following location in the Plan installation directory:

```
<Plan_CDImage>/Database/ELMSchema/install/oracle/ELMSchema/patches/
```

> **Note:** This script populates the *hd_chain_colors_tbl* database table that has been introduced to improve the performance on the Like Item tab.

e. Launch the Plan Updater process to reforecast and reflow AP for all applicable items. You can choose to run the Plan Updater with additional arguments that ensure that faulty carry over items are deleted. For more information, see Additional Plan Updater Arguments (27137).

5. In a Plan and Place co-deployed scenario, you must set up the Foreign JMS Server capability in the WebLogic server. For more information, see Setting Up Foreign JMS Server in WebLogic.

Setting Up Foreign JMS Server in WebLogic

In a Plan-Place co-deployed implementation (over single instances or clusters), you must set up the Foreign JMS Server capability in WebLogic so that the stores information is synchronized and accessible through both the applications.

> **Note:** During the installation, a JMS topic with the JNDI name "com.profitlogic.notification.topic" may already have got installed. Before proceeding ahead, ensure that this JMS topic is deleted.

To set up a foreign JMS Server:

1. As an administrator, log on to the WebLogic Server console.
2. Create a JMS connection factory.
3. Once created, target, and deploy the connection factory on the Plan cluster or instance. The JNDI name must be the same as the "connection-factory-jndi-name" value set in the "weblogic-ejb-jar" for the "StoreSetChangeHandler" MDB.

   For example,

   ```
   Name: CommonConnectionFactory
   JNDI Name:  CommonConnectionFactory
   ```

4. Configure a new Foreign JMS Server.
5. Once created, target, and deploy the Foreign JMS server on the Place cluster or instance.

   For example,

   ```
   Name: NotificationJMSServer
   JNDI Initial Context Factory:  weblogic.jndi.WLInitialContextFactory
   JNDI Connection URL: t3://<Plan-Host-Name>:<port> (Provide a Plan application
   URL)
   ```

6. Create a Foreign JMS connection factory and specify the local and remote JNDI names set for *CommonConnectionfactory*.

   For example,

   ```
   Name: RemoteConnectionfactory
   Local JNDI Name:  CommonConnectionFactory
   Remote JNDI Name: CommonConnectionFactory
   ```

7. Configure a new Foreign JMS Topic and point it to the topic created under the CommonJMSServer deployed on Plan.

   For example,

   ```
   Name: RemoteNotificationTopic
   Local JNDI Name:  com.profitlogic.notification.topic
   Remote JNDI Name: com.profitlogic.notification.topic
   ```

   Note: The 'com.profitlogic.notification.topic' used above is the JNDI name of NotificationEventTopic under CommonJMSServer.

8. Restart the servers.

For more information on the Foreign JMS Server configuration, refer to the *WebLogic Administration Console Online Help*.

In a clustered implementation, since the Place JMS configuration depends on Plan and the two servers are started concurrently, the following exception may get logged during the start up in the Place logs:

```
Registering Application: Store set
com.profitlogic.common.notification.EventException:(1217324969224:0): JNDI lookup
failure[javax.naming.CommunicationException [Root exception is
java.net.ConnectException: t3://<host>:<port>: Destination unreachable; nested
exception is:
java.net.ConnectException: Connection refused; No available router to
destination]]
<.......... More exceptions>
```

Since the JNDI lookup is retrieved by the Place server after start up, such an exception can be ignored during the start up. To avoid this exception, the Place server must be started sequentially after the Plan server.

Fixed Defects

The following defects have been fixed in Plan Release 12.2.2:

- **25670** – During the in-season forecasting store weights were being updated using the in-season lifecycle like item, instead of the in-season store weight like item. Normally, in-season lifecycle and store weight like items is the same item, in which case this issue does not cause any problems in the forecast. But for users that have separate in-season lifecycle and store weight like items, the Calc Engine was using the wrong item for updating the store weights.

  The issue has been fixed and the correct like item is now used for in-season store weight updating.

- **26312** – Users experienced performance issues where plans took a long time to open.

  The relevant queries and views have been tuned to improve the performance of the Plan Worklist.

  Note: To avoid performance issues, Oracle recommends that database maintenance must be done regularly.

- **26335** – Users experienced performance issues on the Like Items tab in the Buy Parameters screen.

  This performance issue has been fixed and no longer occurs in the application. A new database table (*hd_chain_colors_tbl*) has been introduced that improves the performance on the Like Items tab. During the 12.2.2 upgrade, you must run a one-time script (*populate_hd_chain_colors_tbl.sql*) to populate the relevant data in this table. For more information, see Step 4e in the section Upgrading to Plan Release 12.2.2.

  Relevant scripts and procedures have been modified to include the update to this table during the Weekly load.

- **26756** – Performance issues were reported in the Item View Store Pop-up screen.

  The relevant queries and views have been tuned to improve the performance of the Item View Store Pop-up screen.

- **26801** –During the Plan Updater process, the RDM Update process failed when two process threads tried to insert data for the same carry over item at the same time. Errors reported were logged in the Plan Updater log files.

  The way the threads process and insert the data have been tuned and the RDM Update process will no longer fail in this situation.

- **26822** and **27638** – Cases were identified where the context of the item was lost on the Item View or Buy Parameters screen. This occurred because of a database contention issue.

  The configuration for the grids have been updated and the context of the item being lost no longer occurs in the application.

- **26944** – The In-season Update process was being skipped for the Non-shifted Tabular PLC.

  This issue has been fixed and the In-season Update process is now correctly implemented for the Non-shifted Tabular PLC.

- **26950** – For items with no future planned DC receipts, the constrained forecast request did not include the DC Ending on Hand (EOH). This caused the sales to be lesser than expected.

  This issue has been fixed. Now, the constrained forecast request includes the DC EOH (if any) and all future planned receipts.

- **27136** – Store Base tab (on the Buy Parameters screen) displayed incorrect store count for items with the Storebase Mode set to AP Stores. The AP store base was being under-estimated in some cases because the store base did not include stores that had on hand (OH) quantities but no planned sales or receipts.

  This issue has been fixed and the AP Store Base now includes all the stores that have any AP metrics (Sales, Receipts, or Inventory). The Store Base tab now displays the correct store count.

- **27137** – Items were identified with receipts that got carried over to the next plan period after the out of stock date.

  To remove all such items that got carried over to the next plan period, the Plan Updater process now includes additional arguments that provide you the ability to delete such items. For more information, see Additional Plan Updater Arguments (27137).

- **27407** – The following error message was logged in the WebLogic console during the Plan Updater process:

  ```
  ERROR [ExecuteThread: '51' for queue: 'weblogic.kernel.Default']
  (AggregateItemFacadeEJB.java:1959) - Error updating segments
  java.lang.IllegalArgumentException: calcParams argument is null for
  plannedItemId:<Plan Item ID>
  ```

  To avoid this error, you must run the *flow_param_null_fix.sql* SQL script (introduced in Release 12.2.2) before running the Plan Updater process. For more information, see Step 4d in the section Upgrading to Plan Release 12.2.2.

  Note: You must also include this script to run before the Plan Updater step in the batch schedule set up for your implementation.

- **27573** – Users were unable to save the calculation parameters when the associated pricing events started before the Out of Stock date of any individual color. This issue occurred because of a validation that allowed the save operation only for dates after the Out of Stock date of each color.

  This issue has been fixed. The Pricing Plan screen is now enhanced to allow the pricing events that start before the start date of the individual colors, so long as it is on or after the start-date of the style. This enables the Planners define a single Pricing Event for a style containing multiple colors that have staggered start dates, but must be included in a single promo event.

- **27656** – For the mock colors with unplanned weeks, the Total AP Receipts and Total AP Sales changed when the users performed the *Revert Receipts to System Flow* or *Revert Sales to System Flow* actions (on the Item View screen).

  This issue has been fixed. For mock colors with unplanned weeks, *Revert Receipts to System Flow* or *Revert Sales to System Flow* actions have been updated in such a manner that the Total AP Receipts and Total AP Sales do not change as a result of these actions.

- **27682** – On the Item View screen, the Need BOH calculation was incorrect for in-season item.

  This issue has been fixed as part of Issue 27530. The Need BOH has now been reviewed and corrected along with the Need Receipt calculation.

- **27751** – In-Season forecast generated for a store with low inventory did not reflect the in-season behavior, when the external store weights were selected. This occurred because the store weeks with low inventory were being filtered out of the store weight calculation and the forecast request XML did not contain the in-season store weight information when external store weights were selected.

  This issue has been fixed. The forecast request XML now includes the *Store Weights In-season* entry and to prevent the stores with low inventory from being filtered out of the store weight calculation, the following parameter has been introduced in the *delphi.properties* file:

  ```
  delphi.store.weight.threshold
  ```

  Ensure that the value for this parameter to **0.0**, to avoid filtering out store weeks with low inventory. For more information on the *delphi.properties* file, refer to the *Oracle Retail Plan Configuration Guide*.

Known Issues

This section lists the following known issues identified in this release:

- **27109** – When requesting a forecast for an item, the Plan Worklist may not immediately show the updated status in some cases. When the Status link is clicked, the correct updated status will appear.
- **27409** – For carryover items with multiple colors in two plans, in the first plan, a negative DC EOH may appear in the DC Flow tab for the color that starts in the second plan.

  Workaround: To remove the negative DC EOH, you must run the Reconcile Undershipment option (from the Action list on the DC Flow tab) in the second plan. For more information on reconcile undershipment, refer to the *Oracle Retail Plan User Guide*.

- **27410** – A system error may occur when a user tries to edit the information on the DC Flow tab for an item that has been locked by another user.

  Users must avoid editing the information on the DC Flow tab for read-only plans.

- **27430** and **27571** – In the Assortment View screen, the Store Total Receipts may show negative future receipts for items with very small or no future planned receipts. The store count values under the ALL store grade column may also appear incorrect and not match the sum of all the Store Grade columns. This may occur when the grid in the Assortment View is customized in such a manner that the ALL store grade column appears after the other Store Grades columns.

  Workaround: Ensure that your customized settings for the Assortment View are configured correctly.

- **27441** – During the Plan Updater process, the following warning message may get logged as an Error in the WebLogic console:

  ```
  Unable to forecast as All the Colors of this Style are beyond out of stock
  date
  ```

This message can be ignored. It means that the item does not need a new forecast.

- **27630** – The Need Type for any new colors that are added to a Style with a *Constrained* Need Type may appear as *Unconstrained*.

  Workaround: Once the new colors are added and the like items are set for the new colors, you must unconfirm the shipments on the DC Flow tab, and click Save. You must then add relevant DC quantities to the new colors, confirm the DC shipment, and click Save.

- **27631** – For mock items, the constrained forecast may result in zero when DC shipments are confirmed.

  If you wish to leave the item as a mock item, you must manually set the Need Type Owner to *User* and the Need Type to *Unconstrained*. After you actualize the item and submit it, you will be prompted and the Need Type will change to *Constrained*.

- **27684** – In the Item View screen, the Average Price in the AP segment may recalculate incorrectly when the PLC type is changed in the Need. It may recalculate when users perform the Copy Need To AP action.

  For evaluating forecasts, it is recommended that the users review the unit forecasts than the $ values, which are only updated when a Copy Need to AP action is performed.

- **27747** – The need receipt flow may not change when users try recalculating the What If on the Store Flow tab after changing the delivery frequency.

  Workaround: To avoid this issue, it is recommended that users save after changing the delivery frequency.

- **27748** and **27750** – Although within the confirmed DC receipts, Need Receipts at store level may be a few units more than the Need Sales (difference is usually less than 0.25% of sales at the chain level) over the item's lifecycle. For items with constrained forecast, the Need EOH column may show negative units after the forecast is generated again.

- **27749** – Need receipts of the other plan periods may get modified by a marginal quantity when DC shipment quantities are modified for a specific plan period that occurs within the relevant DC lifecycle.

Oracle Retail Documentation on the Oracle Technology Network

In addition to being packaged with each product release (on the base or patch level), all Oracle Retail documentation is available on the following Web site:

http://www.oracle.com/technology/documentation/oracle_retail.html

Documentation should be available on this Web site within a month after a product release. Note that documentation is always available with the packaged code on the release date.

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

Oracle Retail Plan Relase Notes, Release 12.2.2

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Value-Added Reseller (VAR) Language

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