

Oracle® Retail Plan

Release Notes

Release 12.1

August 2007

Welcome to Oracle Retail Plan 12.1 The following documentation is available with this release:

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

The release notes contain information on new features, issues that have been fixed, and known issues that exist in this release.

What's New in Oracle Retail Plan 12.1

The primary new features of the Oracle Retail Plan 12.1 release include in-season work flow and tracking enhancements.

Plan 12.1 is compatible with and is being co-deployed with Place 12.1. The feature forecast enhancements are consistent between the two applications. All Common Component and Calc Engine updates are also consistent between both applications.

Plan 12.1 delivers the following:

- In-Season Tracking
 - Enhancements to evaluate assortment plans in-season, including the comparison of actual performance to plan, the evaluation of sales performance and inventory positions for the remaining selling season, and the ability to update plans based on latest Actual and Forecast information.
 - Updates to buy parameters in-season.
 - Need and AP segment updates to include actual Sales, Receipts, and Inventory.
 - Calculation and display of Actual In-store dates.
 - Display of Active Status (In-active, Active, or Late).

- Ability to set the Need Storebase to use the Actual Storebase.
- Additional flexibility around the calculation of future AP sales and receipts – through the addition of the following new Segment Actions:
 - Copy Need Sales to AP Sales
 - Optimize Receipt Flow
 - Reconcile Sales to Match Receipts
 - Constrain Sales to Store Receipts
 - Honor Pres Min and Safety Stock
- DC Flow Enhancements:
 - Updated DC Flow screen, which can be used to confirm actual DC delivery dates and quantities and to reconcile DC over-shipments and under-shipments.
 - Display of DC EOH and In-transit metrics on the Item View.
- Tabulated PLC. CE 5.0 has a new Tabulated PLC feature that allows the Calc Engine to use the Like Item's selling shape over time as the Product Lifecycle Curve (PLC) for the forecast. This functionality will improve the reasonableness of the forecast for certain types of items.
- Compatibility with Place 12.1 for both co-deployment support and forecast feature consistency.

Note the Following

When installing and using Plan 12.1, note the following:

- Catch-up script for upgrades. The procedural details for this one-time script that must be run as part of the upgrade are provided in the following section.
- Two new standard load procedures: InSeasonUpdate and Update_EOH_Weekly. Details about these scripts are included in the *Plan Operations Guide*.

One-Time Catch-Up Script

Once you upgrade to Plan release 12.1 (including the database and any manual upgrade steps), you must run a catch-up script that updates the existing information in the database to comply with the new data structure. This script also updates the database entries for the features introduced in this release. Note that this script can take a few hours to run.

To run the catch-up script:

At the SQL prompt, run the catchup_for_harvest.sql file from the following location:

```
<Plan_Installation>/modules/Database/PLANSchema/install/oracle/PLANSchema/patches/
```

About the Catch-Up Script

The catch-up script contains commands and algorithms that update or populate database entries for the following features introduced in the Plan Harvest release:

- Populates actual in-store date for existing (already selling) items.
- Sets the Active flag for existing items. An Active Flag has been introduced (in the ITEM_SETS_TBL) that determines the in-store status of each item, at the style and color level.
- Updates the future AP receipts. For all items that have actual sales data, the script compares the planned receipts with the actual receipts and the algorithm adjusts the future receipts to make up for the over-shipment or under-shipment.
- Copies actual receipt, sales, inventory, and other metrics to the Need and AP segments for each week.
- Flags qualified items for reforecast and RDM refresh.

Fixed Bugs

The following bugs have been fixed in Plan Release 12.1.

- **16512** - The RestartRMIServer.cmd script can be used to automate the stopping and restarting of the RMI Service.
- **17976** - When the aggregation dates are changed, the Forecast status does not change from Complete to Invalid.
- **18422** - The LSP segment data is now published to the RDM.
- **18752** - Size Rank information, for improved sorting, is now published to the RDM in the size_rank field in the rdm_planned_pack_opt_tbl. It has been added as an Attribute Form to the pack_id attribute in the product metadata. It can alternatively be configured in MicroStrategy as a standalone attribute.
- **19800** - The user can now navigate directly to the buy parameters screens from the Item View via links in the Item Selector.
- **20563** - The Pres Min is not violated in the color level AP receipt flow calculation when the forecast is at the style level.
- **20709** - Database archive logging has been enabled for database tables on non-staging schemas.
- **20882** - AP quantities do not change when stores shift grades.
- **21090** - Re-forecasting is successful when the lifecycle duration (in the store flow) is increased for a submitted item.
- **21237** - What If functions correctly when all buy parameters are set but not saved.
- **21346** - For a single item selection, the DC Flow Parameter defaults to the pre-populated value of one delivery. Although DC Flow defaults to a single delivery, the user still needs to visit the DC Flow tab for an item in order for the DC Flow status to become 'Done'.
- **21361** - The size of the "Stores Below Min" alert message in the Assortment View has been expanded so that the entire message can be read.
- **21396** - LILY display no longer filters out records where sales = 0. This was previously resulting in inaccuracies in the LILY data displayed in Item View/What If.

- **21780** - The RDM Refresh procedure has been modified to improve performance.
- **21823** - Editing the Sales % no longer updates the receipt flow. As a result, editing the Sales % in the second plan does not increase the receipts for the submitted item in the first plan for carryover items.
- **21858** - When an item is deleted and then re-added in the same RDM refresh session, the RDM refresh populates the database correctly.
- **22074** - Forecasts for submitted items that have been carried over are no longer failing, as segments are now automatically recalculated after a forecast.
- **22230** - A basic item with a blank outdate can be saved correctly.
- **22231** - The LoadMockData procedure has been modified so that the RDM refresh works correctly for mock items that have client_ids that are the same as existing actual client_ids.
- **22697** - Styles are no longer missing from reports in Microstrategy. This was resolved by fixes for TT21858 and TT22231.
- **22724** - Users can now direct the Calc Engine to use Tabulated PLC (in addition to the 'Regular PLC' and 'Basic PLC' options) when requesting a forecast. This option has been added to the Like Item screen.
- **22729** - Performance improvements have been made on the Item View screen.
- **22773** - The RDM Refresh works correctly when changes are made to the style-level description or client ID.
- **22930** - The MicroStrategy Standard, Report, and Format toolbars are now all available in the Merchant Desktop.
- **23349** - The DC Receipts \$ amount under Flow View matches the value shown in the Assortment View.
- **23365** - The weekly sales load procedure has been modified so that existing sales data is not lost if the load procedure fails and must be re-run.
- **23454** - The load.store_elig procedure has been modified to improve performance.
- **23506** - Location Attributes 7 and 8 have been added to the MicroStrategy metadata.

Known Issues in this Release

The following are known issues for Plan 12.1. If a workaround is available for any of these known issues, it is included in the description.

- **19085** - The Installer does not support the deployment of JMS queues to a WebLogic cluster. To work around this, do the following:
 1. Make a backup copy of the WebLogic server's configuration file, config.xml, and re-name it.
 2. Run a CE installation on a cluster.
 3. After the installation, restore the config.xml with the backup copy.
 4. Restart the administration server and the CE nodes.

- **21676** - If the DC Flow Params are changed, the Pack Opt status flag does not change. This results in incorrect DC delivery dates in the Purchase Order report. To work around this, the user must perform another activity to change the Pack Opt flag and then perform Pack Opt again.
- **21739** - 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. Once this pack opt failure occurs - the user must manually zero out APS quantities for the ineligible store in order to successfully run pack opt.
- **23594** - Applying Color Calc % on the Assortment View will populate AP receipts at the color level, but not AP sales. In order to populate color-level AP sales in this case, the user must run the Reconcile Sales to Match Receipts action from the Item view for each color.
- **23605** - The Active indicator does not dynamically update after the user performs a Refresh Actuals action. In order to see the updated Active Status, the user must exit and re-enter the plan.
- **23611** - There is no validation error upon item submittal when there are no color-level AP sales for the style.
- **23625** - If the forecast is complete for an item and the Need Storebase is changed so that the status is "Not Done", then when the user visits the Assortment View or Item View with Need displayed, a system error is produced.
- **23646** - Assortment View highlighting for under-performing and over-performing items does not work as expected in the following cases:
 - If AP Past Sales or LSP Past Sales has a value of 0, then the AP Past Sales Cell is not highlighted.
 - If AP Total Sales or LSP Total Sales has a value of 0, then the AP Total Sales Cell is not highlighted.
- **23659** - In the Item View, the EOH metric is not displayed for the weeks after the item's outdate.
- **23665** - The Need BOH and ST% metrics are not displayed correctly on the What If screen.
- **23673** - AP Storebase Counts that are displayed in the Need Storebase screen only include stores with future receipts. For active items, it does not include stores that have actual receipts but not future receipts.
- **23674** - The Refresh Actuals action on the Plan Worklist may fail in an environment running against an HP-UX database running Oracle version 10.2.0.2. This issue should be resolved in Oracle version 10.2.0.3.
- **23702** - MD Ind is not getting populated for LILY. However, POS and MD Units and Dollars are getting populated.
- **23706** - Deleting a color from one carryover plan does not remove the color from the DC Flow screen. The workaround is to delete the color from both plans whenever deleting carryover items.
- **23710** - Adding a color to an existing item may result in DC/Store Receipts for existing colors to be associated with the newly added colors in the DC Flow screen. See also TT 23771.

- **23718** - AP quantities can be lower than quantities set in Assortment View after save. This only happens if there are future unplanned weeks beyond the plan with receipts in those weeks. This can happen when scaling the Style or Color values with an existing AP segment or when entering color values if there is an existing style AP segment to scale. The amount it is lower can vary depending on how many receipt weeks are in the plan (the more receipt weeks in the plan the more the quantity is reduced).
- **23719** - A color from an item cannot be deleted if a user has entered a pricing event for the item. The workaround is to delete all user-centered pricing events, delete the color, and then re-add the pricing events.
- **23722** - Reconciling sales to receipts with a carryover item is affecting the sales in the second plan incorrectly.
- **23732** - If future weeks contain AP sales at the style level only (which is typically a result of forecasts at the style level followed by Copy Need to AP), then Pack Opt will cause Sales to be cleared out for future weeks. The workaround for this is to ensure that the color-level sales data is available for future weeks by either:
 - forecasting at the color level and Copying Need to AP
 - Or
 - ensuring that the color level AP receipts are populated, and then running Reconcile Sales to Match Receipts for each color.
- **23733** - If the Initial Retail Price changes for an item, then the Receipt \$ value is not automatically updated. The workaround for this is to force a recalculation of the AP segment by manually updating the APS values or running a segment action that affects the AP receipts (such as Copy Need to AP or Optimize Receipt Flow).
- **23739** - Reconciling the DC shipments for a style, when some colors are active and other colors have not yet started selling, may produce the following error in the UI: "Saving buy parameters failed: null" when the DC delivery being reconciled occurred in the past.
- **23741** - Un-confirming the DC Quantity for a delivery only, while leaving the DC Date confirmed, is not being properly retained after a Recalculate or Save on the DC Flow screen. The workaround is to un-confirm both the DC Date and the DC Quantity for a delivery, recalculate or save, and then confirm the DC Date only.
- **23758** - The DC Flow screen may display incorrect data in the second plan of a carryover item when only some of the colors are carried over.
- **23771** - Receipt quantities on the DC Flow tab do not match the receipt quantities on the Assortment View or the Item View.
- **23845** - Export to Excel fails on the Primary Storeset -> Subset screen.

Master Bug List

The following table lists all the bugs described in this document, arranged in numerical order. If a bug has a BugDB number, that number is also listed.

Table 1 *Master Bug List*

TestTrack #	BugDB #	Fixed/Known Issue
16512		Fixed
17976		Fixed
18422		Fixed
18752		Fixed
19085		Known
19800		Fixed
20563		Fixed
20709		Fixed
20882		Fixed
21090		Fixed
21237		Fixed
21346		Fixed
21361		Fixed
21396	6073425	Fixed
21676		Known Issue
21739		Known Issue
21780		Fixed
21823		Fixed
21858		Fixed
22074	6039075	Fixed
22230		Fixed
22231		Fixed
22697	6047651	Fixed
22724		Fixed
22729	6054271	Fixed
22773	6003982	Fixed
22930	6148752	Fixed
23349	6256110	Fixed
23365	6264313	Fixed
23454	6277368	Fixed
23506	6313779	Fixed
23594		Known Issue
23605		Known Issue

Table 1 (Cont.) Master Bug List

TestTrack #	BugDB #	Fixed/Known Issue
23611		Known Issue
23625		Known Issue
23646		Known Issue
23659		Known Issue
23665		Known Issue
23673		Known Issue
23674		Known Issue
23702		Known Issue
23706		Known Issue
23710		Known Issue
23718		Known Issue
23719		Known Issue
23722		Known Issue
23732		Known Issue
23733		Known Issue
23739		Known Issue
23741		Known Issue
23758		Known Issue
23771		Known Issue
23845		Known Issue