

Plan v12.1.1 Patch Readme

Build IDs:

Plan-12.1.1-292-200710310300-210029

Enginepkg-5.0.1-233-200710151158-208880

This Patch is an update to Plan v12.1. It contains all the fixes and enhancements from previous patch releases. Refer to the individual patch readmes for details. In the 12.1 release, the Plan *Installation Guide*, *User Guide*, *Configuration Guide*, *Administration Guide*, and *Operations Guide* were updated and are available on the CD image in the documentation directory.

Configuration Changes

Change the parameter **delphi.inseasonUpdate.plcScale.exponentialSmoothing.enable** in the delphi.properties file to **false**. By default, it is set to true. When it is set to true, the Calc Engine applies exponential smoothing to the forecasts. This can sometimes result in over-forecasting.

Note the Following:

- Plan 12.1.1 is supported on Red Hat Linux Release 3 Update 6.
- Exponential Smoothing should be turned off in CE for Plan 12.1.1.
- A new IR view (ir_active_stores_vw) has been created that determines the active stores. This is a new configuration point within the application that looks like the ir_actual_in_store_vw. The IR View should return three columns item_set_id, location_id and actual_in_store. Actual_in_store should be null when the location is not active for the item and should be non-null (default view = 1) when the store is active for the item.

One-Time Catch-Up Script

Note: You must run this script for Plan 12.1.1 even if you ran the script for Plan 12.1.

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

Following is a list of all the TestTrack issues that were addressed in Plan v12.1.1:

19779 – The Pack Configuration screen has an indicator that says "Done" or "Not Done" so that a user knows if packs have been selected or not.

21899 – Changes have been made to the Add Like Item Screen to improve the speed at which the Like Item Find returns applicable records. In order to improve performance, the Like Item search leverages Chain-level aggregations of historical data in the database. This change will impact the values displayed for certain metrics in the Add Like Item screen:

1. # of Stores. As a result of this fix - the # of stores column in the 'Add Like Item' screen will now display the maximum # of stores the style sold in for *any single* week in the search period. This will differ from the # of stores displayed in the Like Item screen (after adding the Like Item) - which will continue to display the # of stores the style sold in across *all* weeks in the Aggregation period.
2. Average by Store metrics (Avg Sales U/\$, Avg Rcpt U/\$, Avg MD Units/\$, Avg GP \$). As these metrics are derived based on the # of Stores, they will be impacted by the change to the # of stores metric.

These metrics will now be different between the Add Like Item screen and the Like Item screen. All other metrics should be consistent between the two screens.

Note:

1. The values displayed in the Like Item screen (vs. the Add Like Item screen) represent the accurate values for # of Stores and per-store averages.
2. This change impacts only the data displayed on the Add Like Item screen - and has no impact on the forecast, or on any other functionality in the application.

22058 – Users can set the Store Base to the Assortment View AP that was zeroed out at the individual store level.

23611 – A validation has been added on an item submittal to check for planned sales. The validation checks that lifetime sales of an item = lifetime receipts of the item.

23646 – ASV Highlighting highlights items over 100% variance, including cases when there is zero for AP or LSP.

23650 – Assortment View highlighting now highlights Receipts and Inventory (in addition to AP vs. LSP Sales).

23659 – The leftover EOH calculation in the Item View at the end of the life cycle is now displayed from after the out date until the end of the plan.

23665 – The Need BOH and ST% metrics are correctly displayed on the What If screen.

23673 – Need Storebase AP Store counts now include stores with either future or actual receipts.

23706 – Deleting a color from one carryover plan also removes the color from the DC flow screen.

23733 – If the Initial Retail Price changes for an Item, the Receipt \$ in item_location_periods_tbl is updated.

23739 – Buy Parameters can be successfully saved after reconciling DC Shipments for a style when some colors are active, and other colors have not begun selling, in a situation when the DC delivery being reconciled was in the past.

23741 - Unconfirming DC Quantity only for a delivery (while leaving DC Date confirmed) works correctly after a Recalculate or a Save on the DC Flow screen.

23758 – The DC Flow screen now manages the scenario where only some colors are carried over correctly. It only displays items within the current plan.

23771 – Receipt quantities on the DC flow tab now match Receipt Quantities on the AV/IV.

23853 – The forecast status for failed forecasts displays the descriptive error message from the CE instead of the generic error message.

23976 – A new IR view (ir_active_stores_vw) has been created that determines the active stores. This is a new configuration point within the application that looks like the ir_actual_in_store_vw. The IR View should return three columns item_set_id, location_id and actual_in_store. Actual_in_store should be null when the location is not active for the item and should be non-null (default view = 1) when the store is active for the item.

24057 - Plan 12.1.1 is supported on Red Hat Linux Release 3 Update 6.

24075 - The What If beginning and end forecast do not change when the in store date and out of stock date are adjusted. The work around is to save, exit the BPs, run a forecast, and review in either What If or Item View.

24088 – When changing buy parameters and running forecast in What If with or without saving, the calculations show up incorrectly. However, after exiting buy parameters and running a new forecast, the values are correct when re-entering the What If screen.

24090 – The markdown \$ metrics for the LSP segment are incorrect:

- Permanent MD \$ are very high for the weeks where they are calculated.
- POS MD \$ are negative and high for all weeks in the plan.
- The MD Indicator seems to be pointing to Need or another segment, and is incorrect.

24098 – When the future receipt units are cleared in the Assortment View, the future receipt units in the Stores Total - Receipt Unit column are still displayed because negative actuals were being masked with zero. Now, if the store locations have negative actual Receipts, the value is displayed as negative.

24119 – The LSP segment for OH/BOH/EOH and all calculations that relate to them have a value of 0. AP/Need/LILY are all calculating correctly. This is visible on the Item View, What If, and Assortment View.

24120 – On the What If screen, changes to the Store Base are not reflected in the Need segment until exiting the screen, saving, and re-entering it.

24121 – Pack Opt is working as expected. There are no problems with lock release.

24173 - Exponential Smoothing should be turned off in CE for Plan 12.1.1.

24305 – The Need Style - GM\$ metric has been modified to point to AP components.

Known Issues:

Following is a list of known issues in Plan v12.1.1:

21836 – If a Pricing event starts before the item's life cycle start date, but ends after the start (either during the life cycle, or after the end of the life cycle), then this event is not included.

23605 – The Active indicator does not update correctly after performing the Refresh Actuals action in a plan.

23625 – If the forecast is complete for an item, and the Need Storebase is changed such that the status is 'Not Done', visiting the Assortment or Item View with Need displayed will produce a system error.

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 10.2.0.3 for HP-UX, which will be certified in an upcoming Plan release.

23702 – MD Ind is not getting populated for LILY. POS and MD Units and Dollars are getting populated, but the MD Ind is not.

23719 – A color cannot be deleted from an item that has user-entered pricing events. The work around is to delete all user-entered events. (Simply deselecting the color to be deleted from the existing events is not enough. The events must be deleted entirely).

23722 – Reconciling sales to receipts with a carry over item is incorrectly affecting sales in the second plan.

23732 – If future weeks contain AP sales only at the style level (typically a result of forecasts at the style level, followed by Copy Need to AP), Pack Opt will result in Sales being cleared out for future weeks. The work around is to ensure that color-level sales data is available for future weeks. Do this either by forecasting at the color level and Copying Need to AP or by ensuring color level AP is populated, then running Reconcile Sales to Match Receipts at the color level.

23800 – If items are carried over after finalizing the Buy Params and Min & Pres Min, then Honoring Pres Min works correctly. However, if the Buy Params are changed or Pres Min is changed and re-forecasted, then Honoring Pres Min results in a large amount for the first receipt delivery.

23807 – If a style has colors with actuals and also has mock colors: Actual weeks for the actual colors will not be actual weeks for the mock colors, because mock colors by definition do not have actual weeks. Various segment actions alter the segment but do not alter actual weeks.

Such actions do not alter the actual weeks of the actual colors, but modify the corresponding weeks of the mock colors because mock colors do not have actual weeks.

23813 – Performance issues have been found when making changes across multiple items on the Assortment View and then saving.

23977 – When a user changes the Store Set back to ALL without making any changes (the default in the plan), the planned In Store and OOS dates are erased. The user can work around this by reverting, but if the user hits "save, then erroneous dates critical for the forecast are created.

23986 – The Revert Receipts to System Flow action causes a change to the total AP Store Receipt quantities for in-season items where actual stores are not the same as planned stores.

24048 – Need Style level quantities will not be a rollup of the displayed color level quantities when some color/store combinations are not included in the need storebase. This only impacts the display of the Need on the Assortment and Item Views. It does not impact Copy Need to AP (which behaves correctly).

24083 – Optimize Receipt Flow - when run in all plans for a carry over item - may result in Negative EOH at the end of the life cycle.

24286 – The Force Basic PLC flag is not being set by default for basic items.

24351 – The Weekly EOH update is being done in wrong order. Since the EOH units in item_location_periods_tbl are used by update assortment view cache to calculate BOH for carryover item, the EOH update should be done before cache update. Note that this applies to carryover units only.

Master Defects List

The following table lists all defects described in this document, arranged in a numerical order. The BugDB number, wherever applicable, is also listed.

TestTrack Number	Associated BugBD Number	Fixed / Known Issue
19779		Fixed
21836		Known Issue
21899	5976652	Fixed
22058		Fixed
23605		Known Issue
23611		Fixed
23625		Known Issue
23646		Fixed
23650		Fixed
23659		Fixed
23665		Fixed
23673		Fixed
23674		Known Issue
23702		Known Issue
23706		Fixed
23719		Known Issue
23722		Known Issue
23732		Known Issue
23733		Fixed

23739		Fixed
23741		Fixed
23758		Fixed
23771		Fixed
23800		Known Issue
23807		Known Issue
23813		Known Issue
23853		Fixed
23976		Fixed
23977		Known Issue
23986		Known Issue
24048		Known Issue
24057		Fixed
24075		Fixed
24083		Known Issue
24088		Fixed
24090		Fixed
24098		Fixed
24119		Fixed
24120		Fixed
24121	6486305	Fixed
24173		Fixed
24286		Known Issue
24305		Fixed
24351		Known Issue