

Oracle® Retail Plan Release Notes

Release 12.2

November 2008

Welcome to Oracle® Retail Plan Release 12.2.

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](#)
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What's New in this Release

The following enhancements have been included in Plan Release 12.2:

- **24165** – Plan now includes an ALL Stores Pop-up screen in the Assortment View that reports all stores sales, receipts, and on hand (OH) information. This provides visibility to the AP actions.
- **24247** – The Reconcile Undershipment action now honors the Pres Min. If the first receipt is undershipped, the AP store receipt will now include the Pres Min units set for the plan period.
- **24292** – When an item is submitted, the DC receipts are now confirmed automatically. This includes all the pending DC shipments with receipt dates in the current and previous plan.

When upgrading to Plan Release 12.2, all styles that are in Submitted status will get all their DC Receipts set as Confirmed. Plan Release 12.2 includes a batch process that performs this auto-confirmation during the upgrade.

- **24297** – Once complete, the statuses of the following processes now get updated automatically:
 - Pack Opt
 - Forecast Run
 - RDM Publish
 - Plan Updater

- **24483** – Average Per Store (APS) is now considered as the average of the stores that have an AP higher than 0.
- **24649** – Plan no longer allows a negative AP ending on hand (EOH).
- **24766** – Plan now allows users to generate constrained forecasts. A regular (unconstrained) forecast request assumes an unlimited inventory to assess the need at a store. For items with a planned lifecycle or scenarios such as "What-If", the Plan application now enables you to generate inventory constrained forecasts.
- **24814** – Plan now includes a Sales Load Cleanup script. For more information, refer to the Oracle Retail Plan Operations Guide.
- **24862** – During the Sales load, a validation has now been introduced to ensure that the merchandise exists.
- **24866** – Need Store Count should be allowed to decline at end of life – Current behavior tends to overestimate need sales since it doesn't account for the fact that the number of stores will decline towards end of life of styles. Solution is under discussion
- **24892** – Plan Release 12.2 is now certified on Microsoft Internet Explorer 7
- **24958** - Plan now include a Password Security Management module that helps you generate and store encrypted passwords used in the application. This enables you to meet the password encryption security policies or laws mandated for your business. For more information, refer to the *MetaLink Note 737759.1: Oracle Retail Password Security Management Guide*
- **25015** – The PLC Selection drop-down list (on the Like Items tab) now includes a new "Nonshifted Tabular PLC" option. This option helps to plan for selling trends that are specific to certain weeks of the year such as Christmas or New Year.
- **25216** – Users can now submit an item for its entire lifecycle when submitting a carryover item.

Configuration Updates

The following Plan configuration files have been updated in this release:

- assortmentplan-grid.xml
- itemselector-grid.xml
- plan-column-list.xml
- planworklist-grid.xml
- plan-column-list.xml
- storequantity-grid.xml
- planlibrary-grid.xml
- assortmentplan-grid.xml
- plan.properties
- GridResources.properties
- PlanResources.properties

Upgrading to Plan Release 12.2

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. 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. Before you upgrade to this release, ensure that you have the Plan Release 12.1.7 and all previous patches installed.

To upgrade to Plan Release 12.2:

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. Verify the DC Receipts (Confirmed Status, Confirmed Date, and Confirmed Quantity) for each item.
- b. 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. Launch the Plan Updater process to reforecast and reflow AP for all applicable items.

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 case you have set up a Plan-Place co-deployed environment over 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.

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. The JNDI name should be the same as the "connection-factory-jndi-name" value given 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.

For example,
Name: NotificationJMSServer
JNDI Initial Context Factory: weblogic.jndi.WLInitialContextFactory
JNDI Connection URL: provide plan app URL (eg. t3://dev-app-107:7090).

6. Create a Foreign JMS connection factory. Mention the local and remote JNDI names as given 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.

Since the Place JMS configuration depends on Plan, and the two servers are started concurrently, the following exception is logged during the start up in the Place logs (see below). The JNDI lookup is retrieved by the Place server after start up and hence the exception can be ignored during the start up.

Note: To avoid the exception, Place servers must be started sequentially after Plan servers during startup.

```
Registering Application: Store set
com.profitlogic.common.notification.EventException:(1217324969224:0): JNDI
lookup failure[javax.naming.CommunicationException [Root exception is
java.net.ConnectException: t3://dev-app-107:7090: Destination unreachable;
nested exception is:
java.net.ConnectException: Connection refused; No available router to
destination]]
<..... More exceptions>
```

Fixed Defects

The defects fixed in this release have been organized in the following categories:

- [General Application Issues](#)
- [Assortment View](#)
- [Calc Parm](#)
- [Carry Over](#)
- [Database](#)
- [Item View](#)
- [Packs](#)
- [Performance](#)
- [Plan Updater](#)
- [Plan Worklist](#)
- [Reports](#)
- [What If](#)

General Application Issues

The following general application issues have been fixed in this release:

Defect ID	Description
23581	<p>For styles that had colors whose lifecycles did not overlap, there was a misleading warning message.</p> <p>Since it is a valid use case to have such styles, the application has been updated to handle this condition correctly.</p>
23807	<p>For styles with both actual and mock colors, the <i>Item View</i> at the style level could sometimes be editable for actual weeks as well.</p> <p>This occurred because the <i>Copy Need to AP</i> functionality was handled incorrectly for this use case. The application has been updated to handle this condition correctly.</p>
24602	<p>The computation of store receipts was incorrect in certain cases where the <i>InStoreDate</i> varied by store set or color.</p> <p>This issue has been fixed and now the eligible dates for the store receipts are computed based on the first <i>InStoreDate</i> of each color and the delivery frequency.</p>
24603	<p>There was a mismatch in the numbers between <i>Item View</i> and <i>Assortment View</i>, which led the users to think that the storebases used were different.</p> <p>This issue has been fixed.</p>
24643	<p>The <i>Reconcile Overshipment</i> calculation is incorrectly allocating to stores with lower future receipts.</p> <p>The <i>Reconcile Overshipment</i> calculation has been updated to use a ratio based on receipts in the plan instead of sum of future receipts.</p>

Defect ID	Description
24785	<p>The forecasting and DC Flow were not handled correctly in the following two cases:</p> <ul style="list-style-type: none"> ■ Handling AP data for stores that shifted out of plan. ■ Handling Need data for stores that shifted out of plan, where actual weeks exist. <p>The application has been updated to handle these uses cases in such a manner that stores with actuals are not removed from a plan. Also, AP segment records will be removed for plans with no actuals or submitted items.</p>
25486	<p>The "Optimize Receipt Flow" action failed when the Delivery Frequency of a carried over item was set to Once. This occurred because of an arithmetic calculation that was causing a period to be far out in the future and hence could not be found.</p> <p>The arithmetic calculation has now been fixed.</p>
24077	<p>This issue occurred because of an error in the Like Store logic, when a Like Item appeared multiple times in the Forecast Request XML.</p> <p>The Like Store logic now applies only once to a preseason like item. The resolution for this issue was also delivered via Plan Hot Fix 26.</p>
24440	<p>The Need was blank on the What If and Item View screens for active items with a complete forecast.</p> <p>This issue has been fixed. The storebase inheritance logic was assuming that if a color did not have user selected intersections, it should inherit from the style. Also if users accessed a different user's plan with their own storebase, the store sets flipped on changing the storebase mode.</p>
24470	<p>Use cases were identified where incorrect Actual InStore Date appeared in the Store Flow tab.</p> <p>On the Store Flow tab, Actual InStore Dates now display the correct dates.</p>
25468	<p>The Pack Optimization process failed when a carryover item seemed to have two different identifiers.</p> <p>The logic around this process has been fixed and this issue no longer occurs in the application.</p>
25547	<p>Quantity and date changes made in DC Flow tab did not reflect in the PO Report unless Pack Opt is run again.</p> <p>Quantity and date changes made in the DC Flow tab now reflect in the PO Report. However, for this to happen, the Plan status must be changed from <i>Changed</i> to <i>In Progress</i>.</p>
25791	<p>Forecast failed when a store started selling after its out date.</p> <p>The logic around this issue has been fixed and now the InStoreDate is set as the out date if the InStoreDate is after the out of stock (OOS) date. This way the Calc Engine provides a zero forecast for such stores.</p>

Assortment View

The following Assortment View-related defects have been fixed in this release:

Defect ID	Description
23906	<p>When an exception occurred, users were unable to display the Need in the Assortment or Item Views.</p> <p>This issue has been fixed as part of the fix for the Defect 23892 (in the General Application Issues section) and no longer occurs in the application.</p>
23967	<p>When an exception occurred, users were unable to access the Assortment View.</p> <p>This issue has been fixed as part of the fix for the Defect 23892 (in the General Application Issues section) and no longer occurs in the application.</p>
24857	<p>The <i>Update Future Planned Receipts in AP</i> algorithm treated every store receipt as an overshipment or undershipment and hence there were differences in the quantities when compared with the original receipts.</p> <p>The application has been updated and now the future planned receipts are adjusted for each item at each store so that the totals do not change.</p>
25631	<p>An incorrect alert message appeared when users submit an item before pack optimization.</p> <p>The alert message has been corrected.</p>
25930	<p>Changes made to the color level APS were not being reflected at the style level.</p> <p>This issue has been fixed and no longer occurs in the application.</p>

Calc Parm

The following Calc Parm-related defects have been fixed in this release:

Defect ID	Description
21836	<p>Pricing events that were due to start before a style's InStoreDate will be effective during those days and hence will have an impact on the forecasted sales.</p> <p>Pricing Plan screen now includes events that start before but end after lifecycle start date.</p>
23586	<p>The propagation of the LikeItem scale from style to color was working incorrectly when the color-level scale was entered and then cleared out.</p> <p>This issue has been fixed and the scale now works in the same way as it propagates when entered fresh with no scale at the color-level.</p>
23719	<p>Users were unable to delete a color from an item that had user-entered pricing events.</p> <p>This issue has been fixed and no longer occurs in the application.</p>
23977	<p>Dates were being erased from the <i>Store Flow</i> tab when users changed the storebase from some other storeset to <i>ALL</i>.</p> <p>This issue has been fixed and no longer occurs in the application.</p>
24577	<p>If any one of the storebase modes, storebase, or delivery frequency were updated and the users tried to navigate to the Worklist, all changes to the Buy Parameters were reverted. Hence, setting the storebase mode to <i>User-entered</i>.</p> <p>This issue has been fixed and no longer occurs in the application.</p>

Defect ID	Description
24604	All stores are unchecked in the Storebase tab leading to zero Need. This issue has been fixed as part of the fix for the Defect 24440 (in the General Application Issues section) and no longer occurs in the application.

Calc Engine

The following Calc Engine-related defect has been fixed in this release:

Defect ID	Description
24628	In the Calc Engine, when a basic PLC fit has the same fit error as a fashion fit, the basic PLC was not being used. This issue has been fixed and for use cases where there is no strong evidence whether the item is a fashion item, the basic PLC fit is used by default.

Carry Over

The following Carry Over-related defect has been fixed in this release:

Defect ID	Description
24181	Users were unable to access certain departments in the production environment. This issue occurred because of the mismatch of internal ids of a planned carryover item between two subsequent plans. The dependency has been corrected and this issue no longer occurs in the application.

Database

The following Database-related defects have been fixed in this release:

Defect ID	Description
24351	Although the Ending On Hand (EOH) was updated as part of the In-Season Update load processes, the cached information in the Assortment View did not reflect the new updates. This issue has been fixed and the Assortment view cache now reflects the EOH updates.
24586	The Plan Catchup script failed to populate EOH units for mock items and items that have their lifecycle completely in the future. A new procedure <i>update_eoh_onetime</i> has been introduced that is launched when the Catchup script is run.

Item View

The following Item View-related defects have been fixed in this release:

Defect ID	Description
23926	<p>When calculating the EOH on the Need segment, the entire previous period was considered.</p> <p>This issue has been fixed and for every location, the last week with inventory is now considered during the calculation of EOH.</p>
23986	<p>The <i>Revert Receipts to System Flow</i> action was causing a change to the total AP Store Receipt quantities for in-season items where actual stores are not the same as planned stores.</p> <p>This issue has been fixed.</p>
24378	<p>For stores that had no future sales (AP and Need), the application was unable to match Sales and Receipts for the <i>Reconcile Sales to Match Receipts</i> action.</p> <p>This issue has been fixed.</p>
24411	<p>A redundant validation for the <i>Reconcile Sales to Match Receipts</i> action needed to be removed.</p> <p>The validation has been removed.</p>
24528	<p>If receipts were added from ASV for stores with no Need, the <i>Reconcile Sales to Match Receipts</i> action resulted in a system error. This was because the AUR was not available for these weeks.</p> <p>This issue has been fixed and the application now retrieves the AUR from the nearest week.</p>
24858	<p>Stores with fractional planned inventory being included in the store count was misleading since the number of stores included was inflated.</p> <p>Now for each week, stores with less than 0.5 units of planned inventory have been excluded from the store count on the Item View screen. The store count for each week only includes Stores that have more 0.5 units in inventory</p>

Packs

The following Packs-related defects have been fixed in this release:

Defect ID	Description
25775	<p>During Pack Optimization, cases were identified when the browser stopped responding forcing the users to log out and close their browsers.</p> <p>This issue has been fixed and also delivered as part of the Plan Hot Fix 109.</p>
26752	<p>The Load Pack Hierarchy process failed because of an overflowing sequence number assignment mechanism.</p> <p>This issue has been fixed and also delivered as part of the Plan Hot Fix 12.1.7.1.</p>

Performance

The following Performance-related defects have been fixed in this release:

Defect ID	Description
20538	Users experienced performance issues on the Flow View screen. The Flow View performance has been improved by tuning queries that retrieve data.
23813	There was a significant degradation in time taken to save in case the APS of multiple items had been edited from the Assortment View. The <i>update weekly prices</i> method took a long time to complete. This issue has been fixed and now that method is only called if there is a new AP segment being added for an item.
23827	Additional performance improvements were needed for the RDM Refresh process. Oracle recommends that the administrators must gather table level statistics for the sales table (act_hist_tbl_lvl_0, 1, 2, and 3) every 3 months for the four partitioned tables via a regularly scheduled script. For more information, refer to the <i>Oracle Retail Plan Operations Guide</i> .
24507	Performance issues with the <i>Copy Need to AP</i> action were reported. A complex underlying view caused the cost-based optimizer execution path to be unstable. This issue has been fixed. The database queries have been revised using a temporary table to produce a repeatable execution path.

Plan Updater

The following Plan Updater-related defects have been fixed in this release:

Defect ID	Description
23615	Users occasionally experienced an error updating the segments when re-forecasting. Since the AP segment is no longer updated during the reforecasting process, this issue no longer occurs.
25205	Items were getting re-forecasted every night when the promotion did not change in the actual promo feed. This issue has been fixed. An internal identifier has been removed from the hashing process. It ensures that the rehashing does not occur on reloading the same promotion, and therefore stops unnecessary reforecasting of the item on a nightly basis.

Plan Worklist

The following Plan Worklist-related defect has been fixed in this release:

Defect ID	Description
24415	Users encountered an error when spreading the budget. The <i>Spread Budget</i> screen provides an user interface for distributing the budget among product groups. Any left over budget is assigned to the <i>Other</i> program group. A validation has been added to ensure that the users do not enter a value in excess of 100%. This prevents a negative values to be stored in the <i>Other</i> program group.

Reports

The following Reports-related defects have been fixed in this release:

Defect ID	Description
21612	Report cache settings were not consistent through the reports. This issue has been fixed. The project level caching cannot be controlled through the 2-tiered mode (default setup for the product metadata). Once the metadata is merged with the production metadata (3-tier environment), the reports will retain consistent settings.
24588	Performance issues were reported with the SKU Stores Sales report. Better performance is achieved by setting the <i>STAR_TRANSFORMATION_ENABLED</i> parameter to TRUE for the session.

What If

The following What If-related defect has been fixed in this release:

Defect ID	Description
24235	In the What-IF screen, AUR was being displayed for only one segment and it was not clear to users which segment it represented. This issue has been fixed and the ASR (AUR) appears for all segments—AP, LSP, Need, and LILY.

Known Issues

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

- 25540 – The EOH\$ amount does not appear in the Assortment View, if the APS is manually set at the style level for an item.
- 25621 – Pack Optimization is still allowed in case the item does not have AP sales and receipts in the previous plan.
- 26313 – Users may get a blank browser page, when they try adding a pricing event for multiple items.
- 26366 – The Need Receipts BOH calculation on the Store View is incorrect for items that are carried over into two plans and few stores are selected only in the second plan.
- 26507 – An incorrect Need Type (with a value of *??en_US-plan.planneditem.needtype.0???*) appears when multiple items with dissimilar Need Types are selected in the Item Selector screen or the buy parameters are copied from an item that has a need type as 'Constrained'.
- 26520 – The DC beginning on hand (BOH) is negative, if the store receipts are planned before the first DC receipt.
- 26596 – In the Item View, the *Honor SS +Presmin* action does not function correctly. Receipts get added to the first week when the sales do not exist.
- 26608 – In the Assortment View, the *Copy to Selected* action is not working.
- 26709 – On the Store Flow tab, the DC ending on hand (EOH) calculation may be incorrect for some items at the color level.

- 26712 – On the Like Items tab, the users may encounter JavaScript exceptions on the Web browser.
These exceptions do not affect any feature or action within the application. When prompted with such an exception, click OK, and then proceed.
- 26720 – When performing a constrained forecast, a *Read timed out* error may get reported in the console.
- 26721 – On the Store Pop-up screen (in the Item View), users may encounter an *Unexpected* error when they try adding the hidden columns back on the screen.
- 26756 – The Item Store Pop-up screen may have some performance issues.
- 26820 – On the Spread Item Total screen, the users may encounter JavaScript exceptions on the Web browser.
These exceptions do not affect any feature or action within the application. When prompted with such an exception, click No, and then proceed.
- 26840 – The Reconcile Undershipment algorithm does not work correctly. Cases have been identified where one of the stores is penalized much more than the remaining stores, if there are multiple stores with 0 deficit.
- 26859 – APS at the style level show non-zero values when all the color level values are zero.
- 26932 – On the Assortment View and Item View Store pop-up screens, users may encounter an error in the Customize table window that causes the relevant views to appear inside the pop-up screen. To work around this issue, use the client-side sorting.
- 26950 – Although there is DC inventory, if there are no DC receipts, the DC ending on hand is not included in the forecast request causing the sales to be lesser than expected.

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

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Value-Added Reseller (VAR) Language

Oracle Retail VAR Applications

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(iii) the **SeeBeyond** component developed and licensed by Sun Microsystems, Inc. (Sun) of Santa Clara, California, to Oracle and imbedded in the Oracle Retail Integration Bus application.

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(v) the software component known as **Crystal Enterprise Professional and/or Crystal Reports Professional** licensed by Business Objects Software Limited ("Business Objects") and imbedded in Oracle Retail Store Inventory Management.

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