Common Oracle Retail RPAS Configuration Issues and their solutions

Whitepaper

By Quickborn Consulting LLC

Preface

This document describes how to deal with planning in multiple ways within one RPAS domain on a specific set of measures. The case is illustrated from a configuration point of view. This whitepaper is intended for RPAS configurators.

How to perform multiple ways of planning within one RPAS domain on a specific set of measures

When there are multiple ways of planning to be managed on the same set of measures, we need to bring in specific methods in the configuration in order to build up a simple and easy-to-use process for the users.

Issue:

Within standard RPAS planning solutions, the business process is usually uniform. This implies that measures are usually calculated in the same way, although it is possible to introduce different factors and/or coefficients in the calculation.

The issue we encountered is that the client divides their products into various groups. Each group is planned with a different approach at different hierarchy levels. Moreover, there are key and non-key items within each group which should also be planned distinctly.

Our challenge was to deliver a relevant business process via a configuration which:

- Is capable to handle all the product groups and planning methods.

- Manipulates key and non-key items separately within each product group.

- Is easily understandable and feasible for the users.

- Generates least manual work.

- Avoids any possible human mistake.

- Manages all the exceptional situations.

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- Take into account the circumstance when groups with different planning approaches are combined in the same workbook.

- Minimizes impact on system performance.

Solution:

After analyzing in detail the business request, we decided to use RPAS custom menus in the FUSION client UI to solve the issue.

The solution is as illustrated below:

1. Using flags to determine the planning approach, planning level and key/non-key items in the domain.

2. Implement two custom menus in tab A where users carry out the first step of planning. One of them handles the product groups planned with the same approach but at different levels and the other manages another type of product groups. These two buttons are used mainly to :

   - Save ratios defined by users manually (store to store group ratio and plan sales to last year sales ratio).

3. Implement two other custom menus in tab B where users realize the second step of planning. Same as above, one of them manipulates the product groups planned with the same approach but at different levels and the other operates on another type of product group. The main actions in these buttons are :

   - Keep the plan entered by users on key items at store group level.

   - Automatically calculate the plan value of non-key items at store group level based on the saved plan sales to last year sales ratio.

   - Apply the store to store group ratios saved in previous step on non-key items only.

The reflected business process is in consequence as following:

1. In tab A, users manually define the store to store group ratio crossed with corresponding product level or plan sales to last year sales ratio at store group level, according to the type of product group being planned.

2. Execute the corresponding custom menu in tab A according to the type of product group being planned.

3. In tab B, users plan key items manually at defined levels.

4. Execute the corresponding custom menu in tab B, according to the type of product group being planned, in order to keep the entered plan for key items and calculate the plan for non-key items, and/or to apply the store to store group ratio on non-key items only.

In conclusion, the solution was highly satisfying for the client because it is:

- **Complete**: All planning methods including the variance on planning level and key/non-key items are handled within only four custom menu buttons.

- **Easy-to-use**: The whole planning process is covered by four simple steps among which only two are manual.

- **Sophisticated**: Users can put product groups planned with different approaches into the same workbook and plan each of them independently.

- **Error-free**: All possible human mistakes are avoided and all the exceptional situations (for example when last year sales = 0) are taken into account.

- **High-performance**: Flags, rules, and the whole solution conception are optimized to the maximum in order to have least impact on the system performance.

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