

Appendix F: CPFR Technology Questionnaire

Both parties in any CPFR technology initiative must come to agreement on the types, format, source, and content of the data that they exchange, as well as the security scheme and CPFR process alternatives to be used. The following questionnaire identifies many of the issues that need to be resolved in order to create a viable front-end agreement.

For each item, note the approach that the buyer and seller intend to use. Where there are areas of difference, identify a usable common alternative. For example, the buyer in one relationship may use SKU to identify products, while the seller uses UPC. The seller may be able to map SKUs to UPCs, allowing products in their CPFR collaboration to be identified by SKU.

CPFR Process

Item	Buyer	Seller
1 Will sales forecasts be collaborated on? (if not, skip questions 6-27)		
2 Will order forecasts be collaborated on? (if not, skip questions 18-28)		
3 What is the normal forecast revision interval? (weekly, monthly, quarterly, other)		
4 Are full or net-change forecasts sent?		
5 How frequently are exceptions processed? (weekly, daily, continuous, other)		
6 Who creates the initial sales forecast?		
7 Who will "store" the sales forecast? (buyer, seller, or both)		
8 Who enters events?		
9 Who will generate sales forecast-related exceptions?		
10 Who will make the initial sales forecast revision?		
11 Who will make the secondary sales forecast revision?		
12 How many revisions will be supported and audited?		
13 Who is the final arbiter of sales forecast revisions?		
14 What horizon period of revision changes is maintained on-line?		
15 Are sales forecasts "frozen" within some time window? (If so, within what window?)		

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CPFR Process (Continued from page 155)

Item	Buyer	Seller
16 Will sales forecasts automatically freeze at this window?		
17 Whose sales forecast will be the preference for differences remaining at this horizon?		
18 Who will create the order forecast?		
19 Who will "store" the order forecast?		
20 Who will generate order forecast-related exceptions?		
21 Who will make the initial revision of the order forecast?		
22 Who will make the secondary revision of the order forecast?		
23 How many revisions of the order forecast will be supported and audited?		
24 Who will be the final arbiter of order forecast revisions?		
25 What horizon period of order forecast revisions is maintained on-line?		
26 Are order forecasts "frozen" within some time window? (If so, within what window?)		
27 Will order forecasts automatically be released at this window?		
<i>Resolution: Choice of CPFR process alternatives</i>		

Table 49 (continued)

Data Source (name the application, database, or provider)

Item	Buyer	Seller
1 What is the source for product information?		
2 What is the source for location information?		
3 What is the source for partner information?		
4 What is the source for events information?		
5 What is the source for sales forecasts?		
6 What is the source for order forecasts?		
7 What is the source for sales results?		
8 What is the source for orders?		
9 What is the source for in-stock inventory information?		
10 What is the source for item profiles?		
<i>Resolution: Sources for CPFR data</i>		

Table 50

Data Attributes

Item	Buyer	Seller
1 What bucket size is used for sales forecasts? <i>(daily, weekly, monthly, other)</i>		
2 How many buckets in a sales forecast? <i>(12, 13, 52, other)</i>		
3 What is the sales forecast bucket boundary? <i>(day of week, fiscal period, other)</i>		
4 At what level are sales forecasts shared? <i>(store, DC, region, account, other)</i>		
5 How many location-pairs are sales forecasted in the partnership?		
6 How many products are sales forecasted?		
7 Are component sales forecasts generated? <i>(base, promotional, seasonal)</i>		
8 What bucket size is used for order forecasts? <i>(daily, weekly, monthly, other)</i>		
9 What is the order forecast bucket boundary? <i>(day of week, fiscal period, other)</i>		
10 How many buckets in an order forecast? <i>(112, 13, 52, other)</i>		
11 At what level are order forecasts shared? <i>(store, DC, region, account, brand/category, other)</i>		
12 How many location-pairs are order forecasted in the partnership?		
13 How many products are order forecasted?		
14 Are component order forecasts generated? <i>(fill, promotional, seasonal)</i>		
15 What bucket size is used for results data? <i>(daily, weekly, monthly, other)</i>		
16 What is the result bucket boundary? <i>(day of week, fiscal period, other)</i>		
17 At what level are results shared? <i>(store, DC, region, account, other)</i>		
18 At what level is in-stock inventory reported? <i>(store, DC, region, account, other)</i>		
19 Can the partner's unit of measure be matched for the products collaborated on?		
<i>Resolution: Detailed attributes of data to be shared</i>		

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Data Format

Item	Buyer	Seller
1 Will data be exchanged between companies, or managed at one site? <i>(If data will be managed at one site, skip to the next section, "Identification")</i>		
2 Are X 12 830 transaction sets supported? <i>(If not, when will they be?)</i>		
3 Are X 12 852 transaction sets supported? <i>(If not, when will they be?)</i>		
4 Are X 12 850/875 transaction sets supported? <i>(If not, when will they be?)</i>		
5 Is the X 12 893 transaction set being used to request a forecast?		
6 Are VICS EDI guidelines for formatting messages used?		
7 Which revision of EDI standards and guidelines is used?		
8 Is SIL supported?		
9 Are EDIFACT/GEDI supported?		
10 Is XML supported? If so, what data dictionary will be used?		
<i>Resolution: Message formats to be used to exchange CPFR data</i>		

Table 52

Identification

Item	Buyer	Seller
1 What identifiers are used for companies? <i>(DUNS, vendor/customer number)</i>		
2 What identifiers are used for products? <i>(GTIN, UPC, vendor part number, retail SKU/PLU)</i>		
3 What identifiers are used for locations? <i>(DUNS+4, GLN, other [specify])</i>		
<i>Resolution: Common product, location, and company identification to be used</i>		

Table 53

Security

Item	Buyer	Seller
1 Will end-users be connecting to the CPFR system over a public network?		
2 Will data be exchanged between CPFR systems over a public network?		
3 How will users be authenticated?		
4 How will data be encrypted?		
5 Are firewalls in place?		
6 How will access be made through a firewall <i>(if applicable)?</i>		
<i>Resolution: CPFR security scheme to be used</i>		

Table 54