Oracle® Retail Item Planning

User Guide for the RPAS Fusion Client

Release 15.0

E65679-01

December 2015

ORACLE®

Oracle Retail Item Planning User Guide for the RPAS Fusion Client, Release 15.0

E65679-01

Copyright © 2015, Oracle and/or its affiliates. All rights reserved.

Primary Author: Nirmala Suryaprakasha

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Value-Added Reseller (VAR) Language

Oracle Retail VAR Applications

The following restrictions and provisions only apply to the programs referred to in this section and licensed to you. You acknowledge that the programs may contain third party software (VAR applications) licensed to Oracle. Depending upon your product and its version number, the VAR applications may include:

(i) the **MicroStrategy** Components developed and licensed by MicroStrategy Services Corporation (MicroStrategy) of McLean, Virginia to Oracle and imbedded in the MicroStrategy for Oracle Retail Data Warehouse and MicroStrategy for Oracle Retail Planning & Optimization applications.

(ii) the **Wavelink** component developed and licensed by Wavelink Corporation (Wavelink) of Kirkland, Washington, to Oracle and imbedded in Oracle Retail Mobile Store Inventory Management.

(iii) the software component known as **Access Via™** licensed by Access Via of Seattle, Washington, and imbedded in Oracle Retail Signs and Oracle Retail Labels and Tags.

(iv) the software component known as **Adobe Flex™** licensed by Adobe Systems Incorporated of San Jose, California, and imbedded in Oracle Retail Promotion Planning & Optimization application.

You acknowledge and confirm that Oracle grants you use of only the object code of the VAR Applications. Oracle will not deliver source code to the VAR Applications to you. Notwithstanding any other term or condition of the agreement and this ordering document, you shall not cause or permit alteration of any VAR Applications. For purposes of this section, "alteration" refers to all alterations, translations, upgrades, enhancements, customizations or modifications of all or any portion of the VAR Applications including all

reconfigurations, reassembly or reverse assembly, re-engineering or reverse engineering and recompilations or reverse compilations of the VAR Applications or any derivatives of the VAR Applications. You acknowledge that it shall be a breach of the agreement to utilize the relationship, and/or confidential information of the VAR Applications for purposes of competitive discovery.

The VAR Applications contain trade secrets of Oracle and Oracle's licensors and Customer shall not attempt, cause, or permit the alteration, decompilation, reverse engineering, disassembly or other reduction of the VAR Applications to a human perceivable form. Oracle reserves the right to replace, with functional equivalent software, any of the VAR Applications in future releases of the applicable program.

Contents

Send Us Your Comments xiii

Preface xv

Audience xv
Documentation Accessibility xv
Related Documents xv
Customer Support xvi
Review Patch Documentation xvi
Improved Process for Oracle Retail Documentation Corrections xvi
Oracle Retail Documentation on the Oracle Technology Network xvii
Conventions xvii

1 Introduction

Item Planning Process 1-1
Item Planning Benefits 1-1
Item Planning Features 1-2
Preseason Planning 1-2
Plan Versions 1-3
In-Season Management 1-3

2 Week Mapping

Building the Week Mapping Workbook 2-1
Last Year and Adjusted Last Year Week Mapping 2-2

3 Maintain Reference Curves

Building the Maintain Reference Curves Workbook 3-1
Maintain Curve Profiles View 3-2

4 Maintain Markdown Parameters

Building the Maintain Markdown Parameters Workbook 4-1
Define Promotion Calendar Step 4-3
Promotions Definition View 4-3
Promotions Weeks View 4-4

Define Clearance Cadences Step 4-5
Markdown Cadence View 4-5

5 Maintain Item and Store Attributes

Building the Maintain Item and Store Attributes Workbook 5-2
Review and Define Item Attributes Step 5-3
Define Like Item Mapping Step 5-4
Validate Mapping Step 5-5
Review and Define Store Attributes Step 5-6

6 Develop and Approve Item Plans

Building the Develop and Approve Item Plans Workbook 6-2
Review Assortment Plan Step 6-4
Assortment Plan Parameters View 6-4
Assortment Plan Details View 6-5
Set Up Parameters to Seed Item Plans Step 6-6
Reference Curves View 6-7
Item Plan Parameters View 6-7
Seed View 6-10
Seeding the Plan 6-11
Assign Pricing Events Step 6-12
Promotions Definition View 6-12
Promotions Weeks View 6-13
Promo Mapping View 6-13
Markdown Cadence View 6-13
Manage Item Plans and Promotional Lifts Step 6-14
Item Plan View 6-14
Promo Details View 6-15
Set Up Parameters to Seed Plan Task: Receipt and Inventory Plan 6-17
Item Plan Parameters View: Receipt Parameters Measure Profile 6-17
Manage Item Plans and Promotional Lifts Task: Receipt and Inventory Plan 6-20
Item Plan View: Receipts and Inventory Measure Profile 6-20
Review and Approve Item Plans Step 6-22
Plan Review View 6-22
Review and Approve Item Plans View 6-23
Committing Targets 6-26
All Measures View 6-26

7 Monitor and Adjust Item Plans

Building the Monitor and Adjust Item Plans Workbook 7-2
Review Performance Dashboard Step 7-4
Dashboard View 7-4
Bounds View 7-5
Review Assortment Plan Step 7-6
Assortment Plan Parameters View 7-6
Assortment Plan Details View 7-7

Edit Item Plans Step 7-9
Review and Approve Item Plans Step 7-10

8 Approval to Original Plan

Building the Approval to Original Plan Workbook 8-1
Allow Op Approval 8-2

9 Data Load Validation

Building the Data Validation Workbook 9-1
Assortment Planning Measures View 9-3
Default Measures View 9-6
Item Planning Measures View 9-8
MFP Measures View 9-10

List of Figures

1–1 Item Planning Process Diagram 1-4
2–1 Week Mapping Task 2-1
2–2 Week Mapping Workbook Wizard: Select Week 2-2
2–3 Set LY Mappings View 2-2
3–1 Maintain Reference Curves Task 3-1
3–2 Reference Curves Workbook Wizard: Select Class 3-2
3–3 Maintain Curve Profiles View 3-2
3–4 Maintain Curve Profiles Graph View 3-3
4–1 New Workbook Dialog Box 4-1
4–2 Markdown Parameters Wizard: Select Promotion 4-2
4–3 Markdown Parameters Wizard: Select Calendar 4-2
4–4 Promotions Definition View 4-3
4–5 Promotions Weeks View 4-4
4–6 Markdown Cadence: Basis (Year/Item) Selection View 4-5
4–7 Markdown Cadence View: Cadence 01 4-6
4–8 Markdown Cadence View: Cadence 02 4-6
5–1 Maintain Item and Store Attributes Steps 5-1
5–2 Maintain Item and Store Attributes Steps 5-2
5–3 Maintain Item and Store Attributes Wizard: Select Style/Color 5-2
5–4 Maintain Item and Store Attributes Wizard: Select Channel 5-3
5–5 Review and Define Item Attributes View 5-3
5–6 Map Items View 5-4
5–7 Map Like Item Button 5-5
5–8 Review Mapped Sales 5-5
5–9 Review and Define Store Attributes View 5-6
6–1 Develop and Approve Item Plans Task 6-1
6–2 New Workbook Dialog Box 6-2
6–3 Workbook Wizard: Calendar Selection 6-3
6–4 Workbook Wizard: Product Selection 6-3
6–5 Workbook Wizard: Location Selection 6-4
6–6 Assortment Plan Parameters View 6-4
6–7 Assortment Plan Details View 6-5
6–8 Reference Curves View 6-7
6–9 Item Plan Parameters - Sales Parameters Measure Profile 6-8
6–10 Item Plan Parameters - Markdown Parameters Measure Profile 6-9
6–11 Seed View 6-10
6–12 Seed Button 6-11
6–13 Seeding Success Message 6-11
6–14 Promotions Definition View 6-12
6–15 Promotions Weeks View 6-13
6–16 Promo Mapping View 6-13
6–17 Markdown Cadence View 6-14
6–18 Item Plan View 6-15
6–19 Promo Details View 6-16
6–20 Promo Detail View for Back to School Promotion 6-16
6–21 Promo Details View for the Fall Sales Promotion 6-17
6–22 Item Plan Parameters View: Receipt Parameters Measure Profile 6-18
6–23 Planning Actions: Calculate Receipt Flow 6-19
6–24 Item Plan View: Receipts and Inventory Measure Profile 6-21
6–25 Item Plan View: Sales and Margin Plan Measure Profile 6-22
6–26 Plan Review Step: Compare to MFP Cost Cp Plan 6-23
6–27 Plan Approval View 6-24
6–28 Approve Item Plans Button 6-24
6–29 Plan Approved Message 6-24

6–30 Approved Plans 6-25
6–31 All Measures View 6-26
7–1 Monitor and Adjust Item Plans Task 7-1
7–2 New Workbook Dialog Box 7-2
7–3 Workbook Wizard: Calendar Selection 7-2
7–4 Workbook Wizard: Product Selection 7-3
7–5 Workbook Wizard: Location Selection 7-3
7–6 Dashboard View 7-4
7–7 Bounds View 7-5
7–8 Assortment Plan Parameters View 7-7
7–9 Assortment Plan Details View 7-8
7–10 Item Plan View 7-10
8–1 Approval to Original Plan Validation 8-1
8–2 Approval to Original Plan Workbook Wizard - Calendar Selection 8-2
8–3 Allow OP Approval View 8-2
9–1 Data Load Validation 9-1
9–2 Data Load Validation Workbook Wizard - Calendar Selection 9-2
9–3 Data Load Validation Workbook Wizard - Product Selection 9-2
9–4 Data Load Validation Workbook Wizard - Location Selection 9-3
9–5 Assortment Planning Measures View 9-4
9–6 Default Measures View 9-7
9–7 Item Planning Measures View 9-9
9–8 MFP Measures View 9-11

List of Tables

2–1 Set LY Mappings View Measures 2-3
3–1 Maintain Curve Profiles View Measures 3-3
4–1 Promotions Definition View Measures 4-3
4–2 Promotions Definition View Measure 4-4
4–3 Markdown Cadence View Measures 4-6
5–1 Review and Define Item Attributes View Measures 5-3
5–2 Map Items View Measures 5-5
5–3 Review Mapped Sales View Measures 5-6
5–4 Review and Define Store Attributes Measures 5-6
6–1 Assortment Plan Parameters View Measures 6-5
6–2 Assortment Plan View Step Measures 6-6
6–3 Reference Curves View Measures 6-7
6–4 Seed View Measures 6-10
6–5 Promotions Definition View Measures 6-12
6–6 Markdown Cadence View Measures 6-14
6–7 Promo Details View Measures 6-17
6–8 Item Plan Parameters View - Receipt Parameters Measure Profile 6-19
6–9 Approval Step Measures 6-25
7–1 Dashboard View Measures 7-4
7–2 Bounds View Measures 7-5
7–3 Assortment Plan Parameters View Measures 7-7
7–4 Assortment Plan Details View Measures 7-8
8–1 Allow Op Approval View Measures 8-3
9–1 Assortment Planning View Measures 9-4
9–2 Default Measures View Measures 9-7
9–3 Item Planning Measures View Measures 9-9
9–4 MFP Measures View Measures 9-11

Send Us Your Comments

Oracle Retail Item Planning User Guide for the RPAS Fusion Client, Release 15.0

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document.

Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

> **Note:** Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the Online Documentation available on the Oracle Technology Network web site. It contains the most current Documentation Library plus all documents revised or released recently.

Send your comments to us using the electronic mail address: retail-doc_us@oracle.com

Please give your name, address, electronic mail address, and telephone number (optional).

If you need assistance with Oracle software, then please contact your support representative or Oracle Support Services.

If you require training or instruction in using Oracle software, then please contact your Oracle local office and inquire about our Oracle University offerings. A list of Oracle offices is available on our Web site at `http://www.oracle.com`..

Preface

This guide describes the Item Planning user interface. It provides step-by-step instructions to complete most tasks that can be performed through the user interface.

Audience

This User Guide is for users and administrators of Oracle Retail Item Planning. This includes merchandisers, buyers, business analysts, and administrative personnel.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Related Documents

For more information, see the following documents in the Oracle Retail Item Planning Release 15.0 documentation set:

- *Oracle Retail Batch Script Architecture Implementation Guide*
- *Oracle Retail Item Planning Installation Guide*
- *Oracle Retail Item Planning Operations Guide*
- *Oracle Retail Item Planning Release Notes*
- *Oracle Retail Item Planning User Guide for the RPAS Classic Client*
- Oracle Retail Predictive Application Server documentation

For more information about the Fashion Planning Bundle applications see the following documentation sets:

- Oracle Retail Item Planning Configured for COE documentation
- Oracle Retail Merchandise Financial Planning documentation
- Oracle Retail Assortment Planning documentation
- Oracle Retail Size Profile Optimization documentation

For more information about the RPAS and Fusion Client, see the documents in the Oracle Retail Predictive Application Server Release 15.0 documentation set.

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

https://support.oracle.com

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 15.0) or a later patch release (for example, 15.0.1). If you are installing the base release or additional patch releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch releases can contain critical information related to the base release, as well as information about code changes since the base release.

Improved Process for Oracle Retail Documentation Corrections

To more quickly address critical corrections to Oracle Retail documentation content, Oracle Retail documentation may be republished whenever a critical correction is needed. For critical corrections, the republication of an Oracle Retail document may at times not be attached to a numbered software release; instead, the Oracle Retail document will simply be replaced on the Oracle Technology Network Web site, or, in the case of Data Models, to the applicable My Oracle Support Documentation container where they reside.

This process will prevent delays in making critical corrections available to customers. For the customer, it means that before you begin installation, you must verify that you have the most recent version of the Oracle Retail documentation set. Oracle Retail documentation is available on the Oracle Technology Network at the following URL:

http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html

An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the

same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of a document with part number E123456-01.

If a more recent version of a document is available, that version supersedes all previous versions.

Oracle Retail Documentation on the Oracle Technology Network

Oracle Retail product documentation is available on the following web site:

http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html

(Data Model documents are not available through Oracle Technology Network. You can obtain them through My Oracle Support.)

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Introduction

Oracle Retail Item Planning (IP) facilitates the translation of merchandise financial plans into execution level, item driven strategies to be followed throughout the life of a product. It represents the bottom-up planning process, complementing, and working in concert with the top-down financial plans. By providing weekly visibility into item performance and financial targets, the item planning process increases the likelihood that merchandising strategies are successfully executed within the financial plan parameters.

Item Planning Process

Item Planning is part of an overall planning process that involves planning at multiple levels of the product hierarchy. The planning process can be thought of as a continual process where each step enhances the following, and prior performance affects plans for future performance. Planning takes input from multiple parties, and communication enhances the process to help drive a financial road map for success. Multiple versions of the plan are created to benchmark success as well as provide insight to opportunities and risk for the in-season period.

Item Planning Benefits

Item Planning provides the following benefits:

- Quantified financial plans
- Unified financial and item strategies
- A proactive approach towards business trends as opposed to reactive
- More efficient use of inventory
- Reduced markdowns
- Increased profits
- Increased return on investment

Item Planning Features

Item Planning provides the following features:

- Item/channel/week planning
- Multichannel support
- Unit plans converted into values
- Reconciliation to financial targets
- Preseason and in-season workflow process support
- Item demand forecast
- Promotional sales planning
- Like item functionality
- Placeholder functionality
- View-to-weekly marketing strategy for each item
- Self approval process
- Robust planning and assessment measure set

Preseason Planning

Prior to the beginning of the style/color's lifecycle, the preseason planning takes place. The process begins with the planner reviewing external and internal data, such as MFP targets, and input from their merchant partners. The planner then maps history where needed for their items that are new, or perhaps have been included in a hierarchy reclassification, and for which the planner would like to specify which history should be utilized by specified items.

Best practices show that planning the reductions measures first, and within that, planning the sales units first, allows for a logical and smooth item planning process. The sales units set the tone by which the remainder of the planned measures are driven.

In the Item Plan Parameters view, the planner selects parameters that initiate an item plan.

First, the planner defines sales and price based parameters such as Start Sell Week and Out of Stock Week, along with the number of stores to be planned and the Rate of Sale as well as Regular Price and Regular Cost. Then the planner selects the baseline curve to spread the sales units over the regular and promotional lifecycle of the item plan.

Next, the planner plans markdowns, first promotional markdowns by assigning style colors to pre defined promotions. Then the planner selects the clearance cadence to define their clearance sell off.

After the total sales units and values have been planned, the planner then defines the receipt parameters such as initial allocation percentage, presentation minimum, receipt frequency, and safety stock.

After receipts have been flowed, the planner can then review the item plan in total.

The planner then reconciles back to the MFP plans; if the plan is reconciled, the planner self-approves the plan.

If the plan does not reconcile back to the MFP plans, the planner returns to the plan's unit sales and reduction planning and adjusts areas of the plan that are required to select reconciliation back to the MFP plans.

Because this is an iterative process, clear communication to the planner's superior is integral to the efficiency and effectiveness of this process.

Plan Versions

The following are versions of the plan:

- Original Plan (Op): The benchmark against which to measure in-season performance.
- Current Plan (Cp): The in-season-updated plan to reflect actual and projected performance.
- Working Plan (Wp): The item planner’s plan version to use while creating the Cp.

In-Season Management

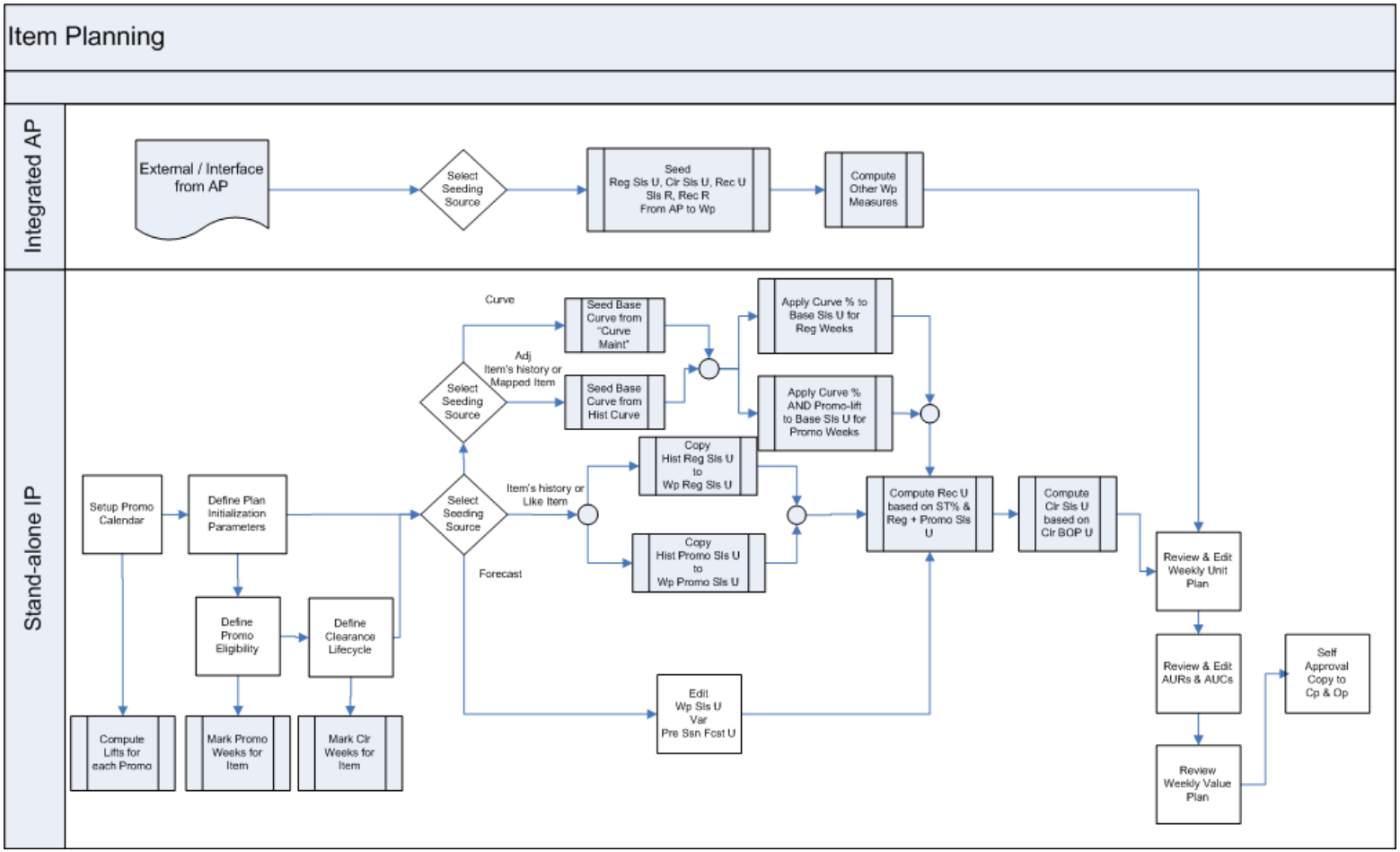
Once the plan period process has begun, in-season planning begins. The planner now uses the plan created in the preseason planning process as the benchmark for successful in-season planning. To begin the in-season planning process, the planner first manually reviews the factors that affect sales.

The planner begins by reviewing the Dashboard view, which highlights the style/colors that are performing differently from the Original Plan. The style/colors that have the largest variance from the plan are likely to need the most attention. By using the exception measures in the Dashboard, the planner can quickly identify the style/colors that need replanning.

The planner determines whether these events are be going, or whether they behave the way they were originally planned. If these special trends does not persist, the planner determines the differences and how they affects the performance of the item. After this process is complete, the planner updates unit sales if needed. As in the preseason planning process, in which planning sales first is the best way to approach a new plan, sales is the first measure that should be updated for in-season planning. All remaining measures are affected by sales.

Next, the planner adjusts future receipts as needed. The planner also reviews how the new sales and receipts affect the resulting inventory. Then the exit strategy is updated. Once the exit strategy is updated, the planner reviews the result in their plans. Then the planner reconciles to MFP, and if the plans are reconciled, the planner self-approves the plan to the current plan. If the plan is not reconciled, the planner goes back to unit sales and performs adjustments as necessary. This process continues until the item plan is reconciled to the MFP plan.

Figure 1–1 Item Planning Process Diagram



2

Week Mapping

The Week Mapping task is used only by the administrator to adjust historical sales to accommodate calendar shifts. The adjusted sales then appear in the Develop and Approve Item Plans task for reference while planning. This functionality is helpful when events shift from one week to another, or when there are different numbers of weeks from one calendar year to another.

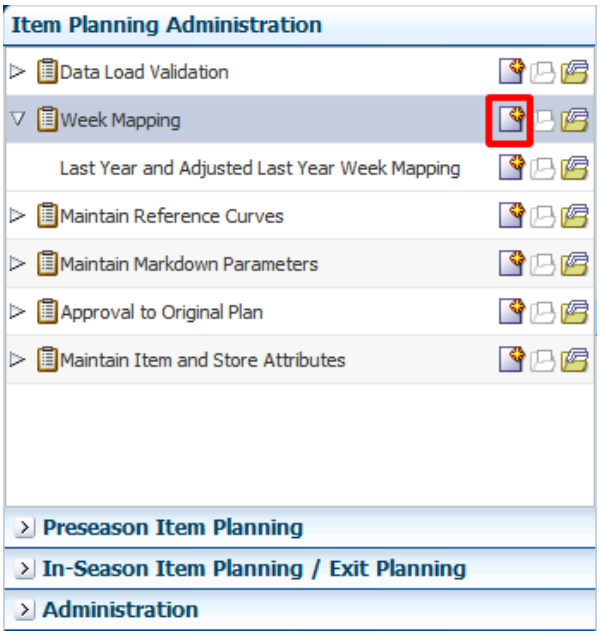
The Week Mapping task contains one step: Last Year and Adjusted Last Year Week Mapping.

Building the Week Mapping Workbook

To build a Week Mapping workbook:

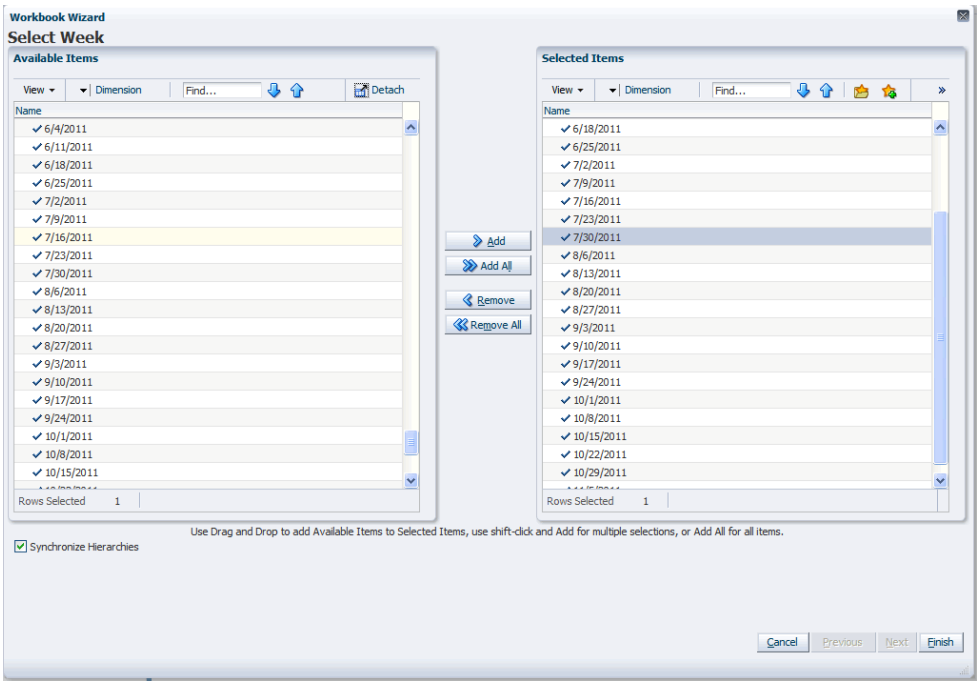
1. Click the **New Workbook** icon in the Week Mapping task.

Figure 2–1 Week Mapping Task



2. The Week Mapping Workbook Wizard appears at the Select Week step. Select the weeks you want to map and click **Finish**.

Figure 2–2 Week Mapping Workbook Wizard: Select Week



The workbook is built.

Last Year and Adjusted Last Year Week Mapping

This step contains a single view called Set LY Mappings. Within this view, you can set the mappings for last year and adjusted last year.

The week indicated in the Adj Ly Lag measure is where the performance data is retrieved when you look at Ly data.

Figure 2–3 Set LY Mappings View

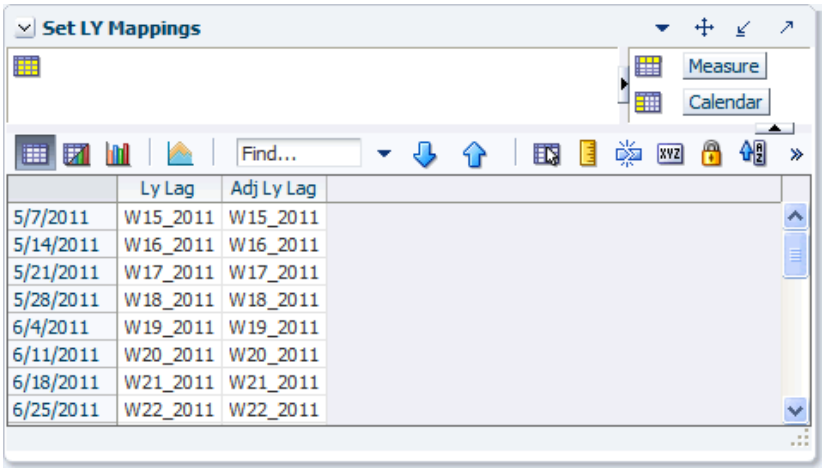


Table 2–1 Set LY Mappings View Measures

Measure	Description
Ly Lag	Identifies the week used for mapping as last year.
Adj Ly Lag	Identifies the week used for mapping as adjusted last year.

3

Maintain Reference Curves

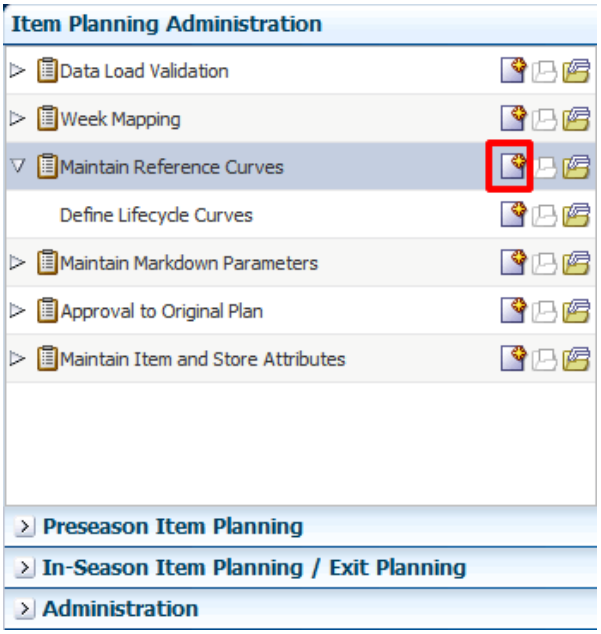
The Maintain Reference Curves task is used to create reference curves, which are used to spread unit sales to week in the Develop and Approve Item Plans task. Reference curves are based on percent-to-total sales, and they shrink or stretch to fit the defined regular or promotional sales period. In Item Planning, reference curves are used only for regular and promotional sales periods, unlike Assortment Planning which uses them for the entire lifecycle of an item. The reference curves created in this task are used in the Develop and Approve Item Plans task.

Building the Maintain Reference Curves Workbook

To build a Maintain Reference Curves workbook, perform the following steps:

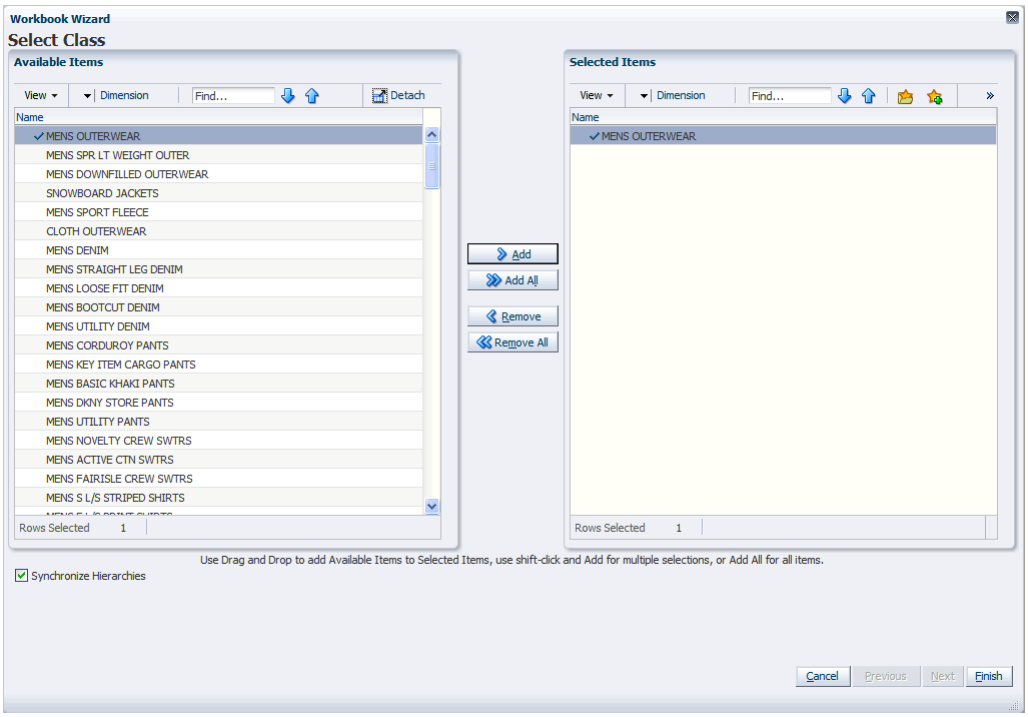
1. Click the **New Workbook** icon in the Maintain Reference Curves task.

Figure 3–1 Maintain Reference Curves Task



2. The Maintain Reference Curves Workbook Wizard appears at the Select Class step. Select the classes you want to map and click **Finish**.

Figure 3–2 Reference Curves Workbook Wizard: Select Class

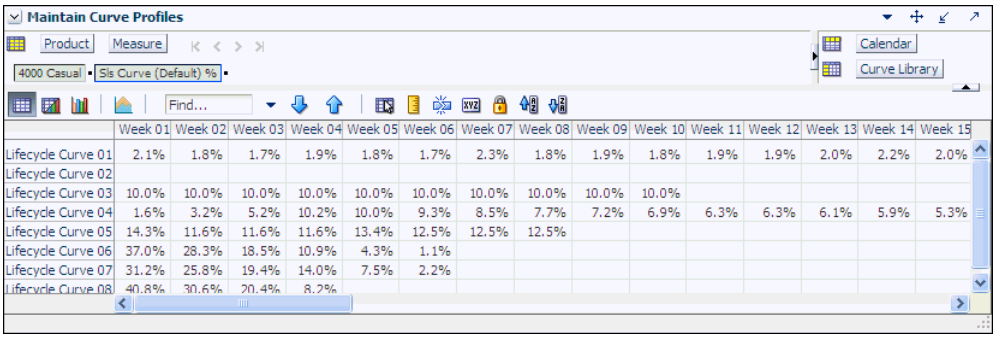


The Maintain Reference Curves workbook is built and opens at the Maintain Curve Profiles View.

Maintain Curve Profiles View

The Define Lifecycle Curves step contains a single view, Maintain Curve Profiles. Use this view to create sales curves to be used in the Develop and Approve Item Plans task. These curve profiles are based on a percent-to-total sales. Regardless of weeks in the curve, the curves can shrink or stretch to fit the defined regular and promotional sales period.

Figure 3–3 Maintain Curve Profiles View



Perform the following steps to create curve profiles:

1. Ensure that **all[Calendar]** is shown in the Calendar dimension.
2. In the intersection of the Sales Curve Label measure and the **all[Calendar]** dimension, enter the label of the curve profile. This label is displayed in the Item Planning task.

3. Starting in Week 01, enter the percent-to-total sales percentage in the weeks of the curve profile. The number of defined weeks is up to you.

> **Note:** You must start the curve in Week 01 for the curve to be able to shrink or stretch to fit the defined regular and promotional sales period.

4. Click **Calculate**. The **all[Calendar]** percentage is calculated based on the percentages in the defined weeks.
5. When finished, save and commit the workbook.

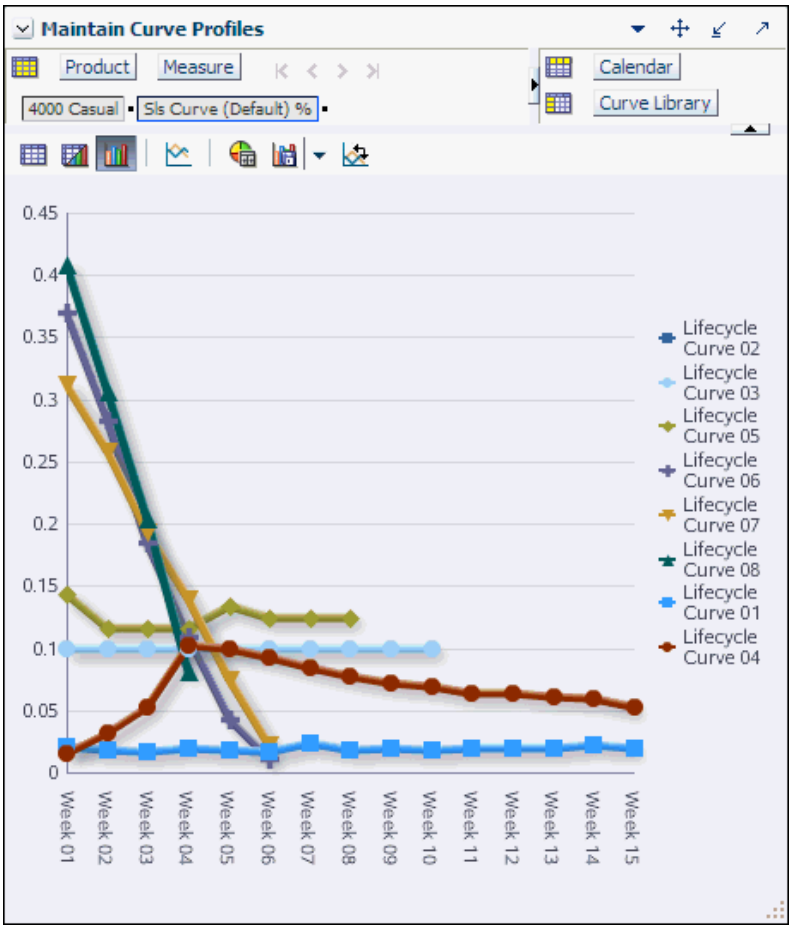
Table 3–1 lists the measures available on this view.

Table 3–1 Maintain Curve Profiles View Measures

Measure	Description
Sales Curve Label	Enter a label for the lifecycle curve. This label is displayed in the Item Planning task.
Sales Curve %	Enter percent-to-total sales percentage in the weeks of the curve.

Use the graph view to see how the curves look over the sales period (Figure 3–4).

Figure 3–4 Maintain Curve Profiles Graph View



4

Maintain Markdown Parameters

The Maintain Markdown Parameters task is used to define the promotions and clearance cadences for corporate, store-wide, or planner-specific promotions. After these are created, they are assigned to style/colors in the Develop and Approve Item Plans task.

This task contains the following steps:

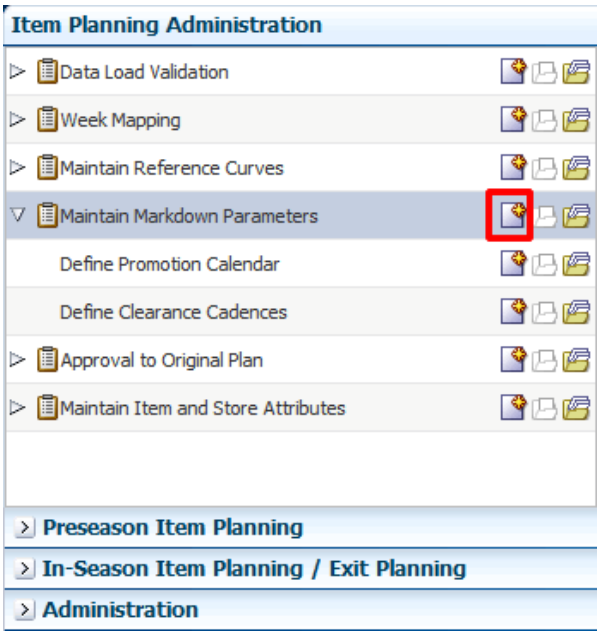
- Define Promotion Calendar Step
- Define Clearance Cadences Step

Building the Maintain Markdown Parameters Workbook

To build a Maintain Markdown Parameters workbook, perform the following steps:

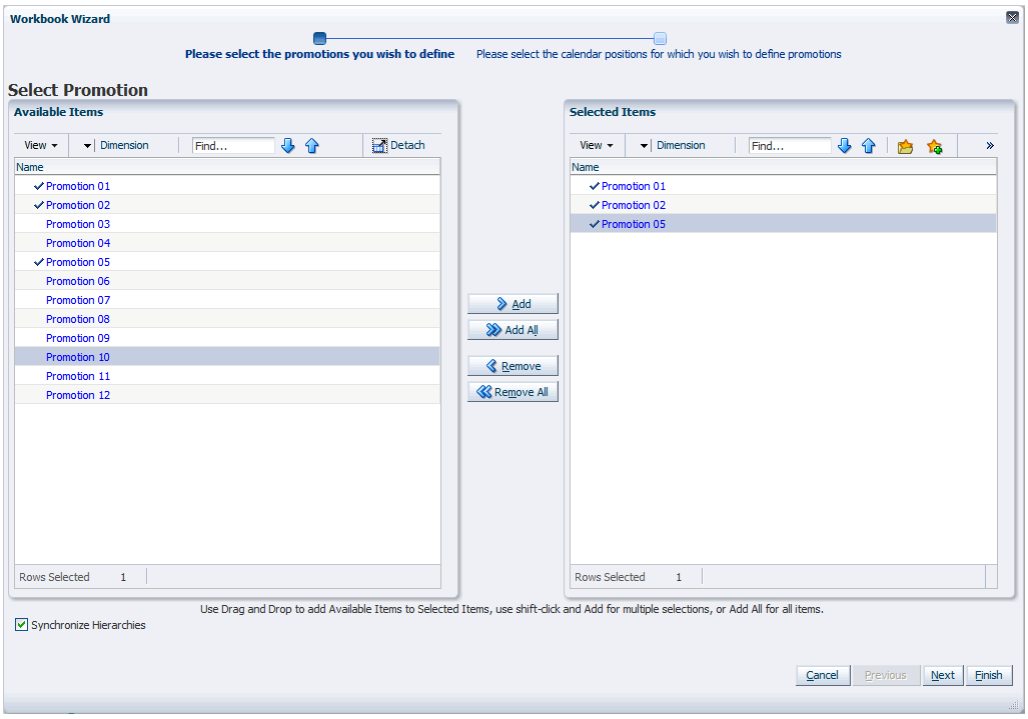
1. Click the **New Workbook** icon in the Maintain Markdown Parameters task.

Figure 4–1 New Workbook Dialog Box



2. The Maintain Markdown Parameters Wizard appears at the Select Promotions step. If you have not previously set up promotions, only generic promotions are available for selection. Select the number of promotions you want to create and click **Next**.

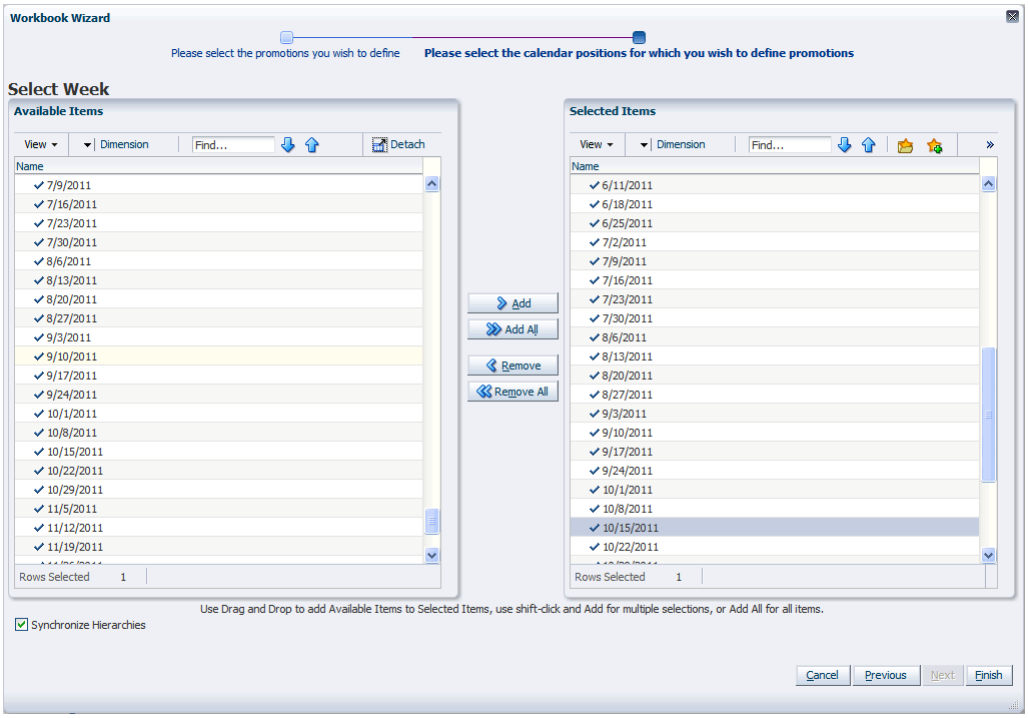
Figure 4–2 Markdown Parameters Wizard: Select Promotion



If you have created promotions previously, those promotions are available for selection.

3. The Calendar step appears. Select the time periods you want and click **Finish**.

Figure 4–3 Markdown Parameters Wizard: Select Calendar



The Maintain Markdown Parameters workbook is built.

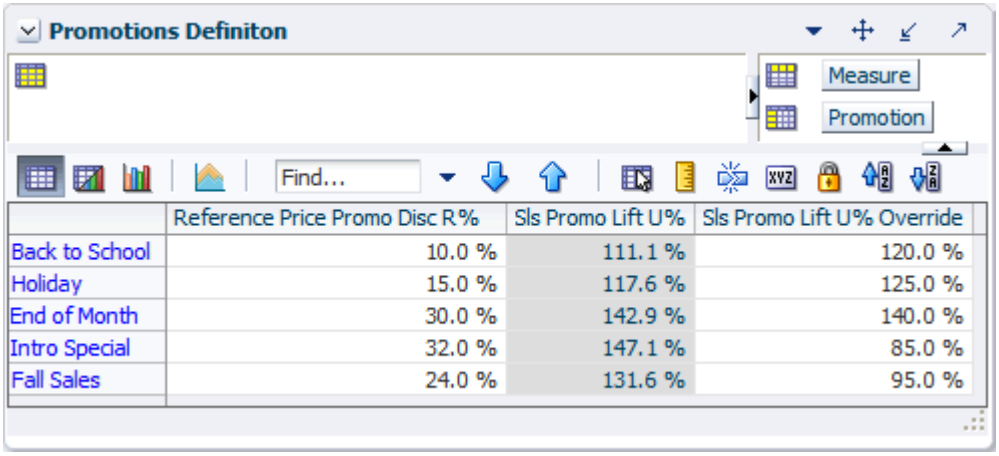
Define Promotion Calendar Step

The Promotions Definition step contains two views: Promotions Definition View and Promotions Weeks View. Use these two views to discount rate, lift, lift override, and lifecycle of promotions.

Promotions Definition View

Use this view to define the lift for the entire promotion. Keep in mind that you are not defining the lift for specific weeks of the promotions but for the entire promotion in general.

Figure 4–4 Promotions Definition View



	Reference Price Promo Disc R%	Sls Promo Lift U%	Sls Promo Lift U% Override
Back to School	10.0 %	111.1 %	120.0 %
Holiday	15.0 %	117.6 %	125.0 %
End of Month	30.0 %	142.9 %	140.0 %
Intro Special	32.0 %	147.1 %	85.0 %
Fall Sales	24.0 %	131.6 %	95.0 %

Perform the following steps to define the promotional lifts:

1. (Optional): Use DPM to change the promotion label to one that represents the event.
2. In the Reference Price Promo Disc R% measure, enter the discount percentage of the promotion.
3. Click **Calculate**. This automatically calculates the Promo Lift U% measure for the promotion. This is the percent of increased sales that must occur to overcome the decrease in price to sell the same dollar amount.
4. (Optional): To use a different promotional lift than the one calculated in Sls Promo Lift U%, enter it in the Sls Promo Lift U% Override measure.

   Note: If you want the override lift to be 20%, enter 120.

   If an override lift exists for a promotion, that lift is used in Develop and Approve Item Plans task. Otherwise, the lift created by the Promo Lift U% measure is used. The lift used is the same for every week in the promotion.

Table 4–1 lists the measures available on this view.

Table 4–1 Promotions Definition View Measures

Measure	Description
Reference Price Promo Disc R%	The discount percentage of the promotion.

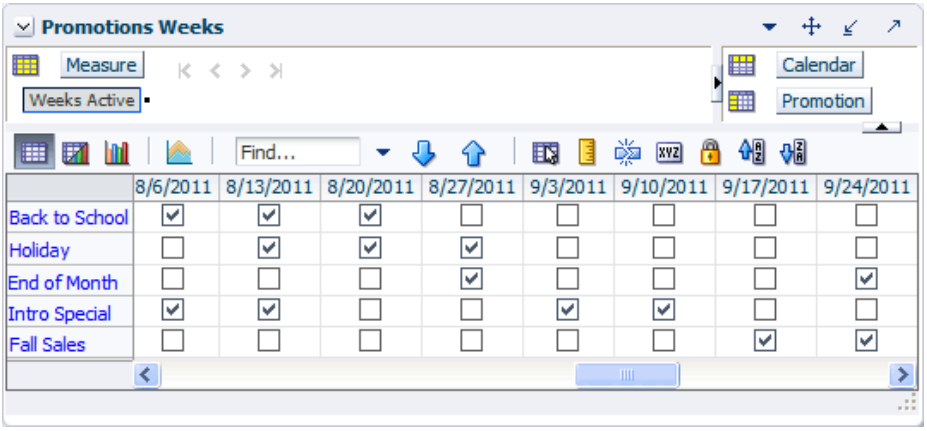
Table 4–1 (Cont.) Promotions Definition View Measures

Measure	Description
Sls Promo Lift U%	The promotional lift. This is the percent of increased sales that must occur to overcome the decrease in price to sell the same dollar amount. The lift in this measure is automatically calculated from the Reference Price Promo Disc R% measure when the user clicks **Calculate**.
Sls Promo Lift U% Override	Use this measure to manually enter the promotional lift. The lift entered in this measure overrides the lift calculated in the Sls Promo Lift U% measure.

Promotions Weeks View

Use this view to define the promotional period for each promotion. The promotional periods uses the lift or lift override defined in the Promotions Definition View.

Figure 4–5 Promotions Weeks View



In this view, select the weeks that make up each promotion. This view contains one measure:

Table 4–2 Promotions Definition View Measure

Measure	Description
Weeks Active	Use this measure to select the weeks of the promotion. Promotions in Item Planning are applied for an entire week. You can also define promotions that are active in non-consecutive weeks. If you have a promotion that is active on the first week of every month, you need to set up only one promotion that is active at each of the selected weeks.

Once you have defined the promotional period and lift for each promotion, continue to the Define Clearance Cadences Step.

Define Clearance Cadences Step

The Markdown Cadence step contains one view: Markdown Cadence.

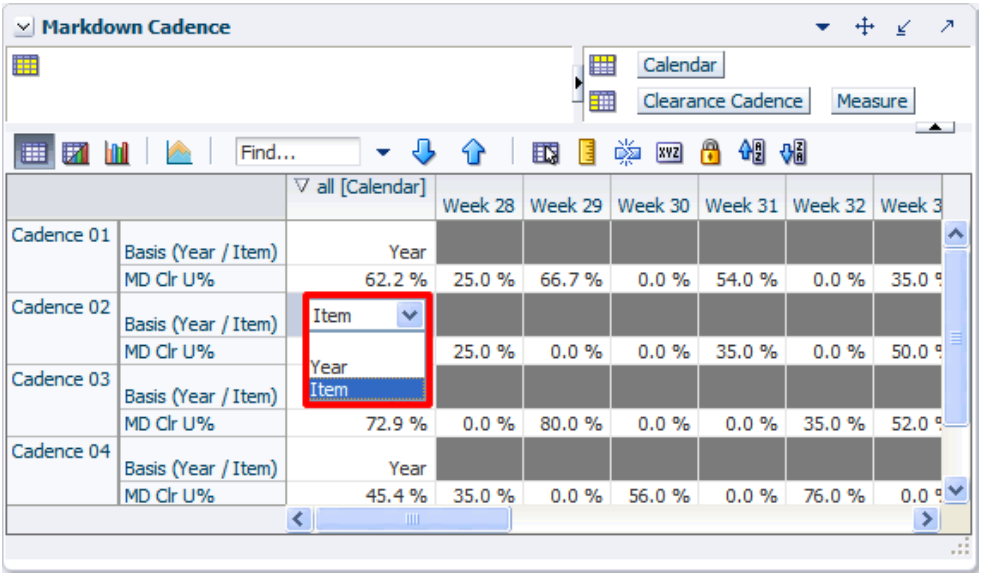
Markdown Cadence View

Use the Markdown Cadence view to define clearance cadences. Clearance Cadences are used when style/colors are ready to be put on hard clearance markdown. These cadences are available for selection in the Dashboard view of the Develop and Approve Item Plans task.

Perform the following steps to define clearance cadences:

1. Ensure that **all[Calendar]** is shown in the Calendar dimension.
2. In the intersection of the Basis (Year/Item) measure and the **all[Calendar]** level, select what the cadence is based on. There are two options:
   - **Year**: Based on the absolute year. If the cadence is defined as starting on Week 36/10, it starts on Week 36 of the fiscal year.
   - **Item**: Based on the lifecycle of the item. If the cadence is defined as starting on Week 36/10, it starts on the first week of the item lifecycle.

Figure 4–6 Markdown Cadence: Basis (Year/Item) Selection View



3. Define the markdown percentages in specific weeks of the cadence.

Figure 4–7 Markdown Cadence View: Cadence 01

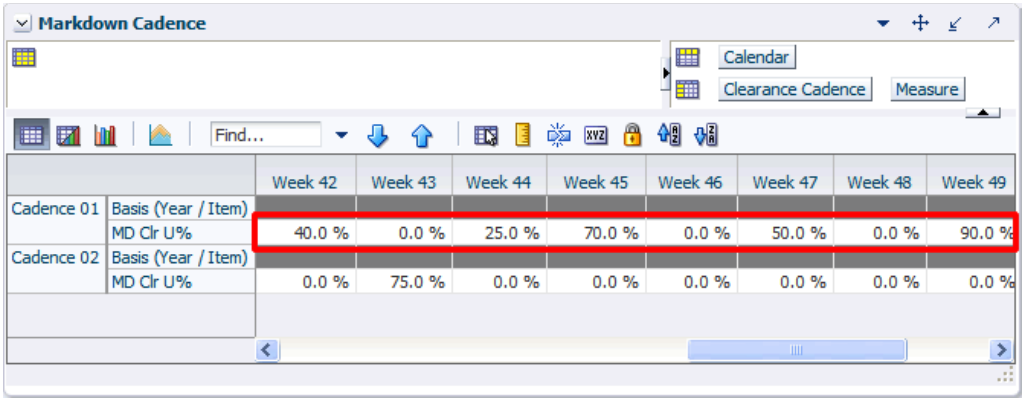
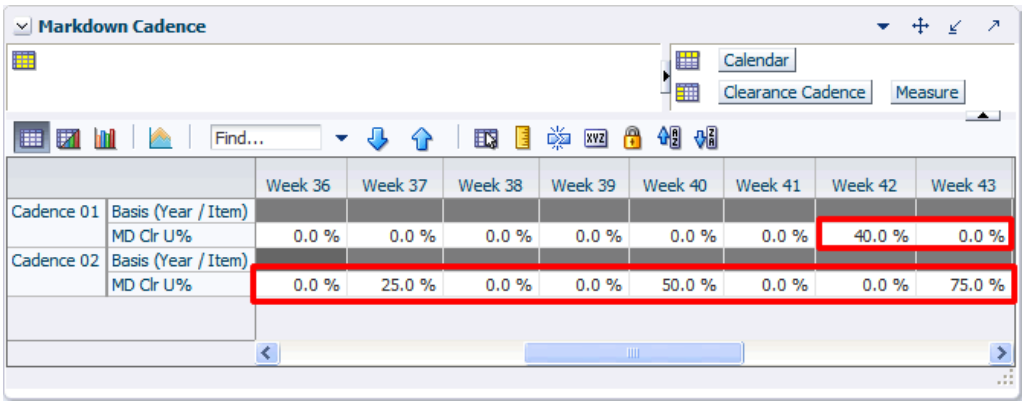


Figure 4–8 Markdown Cadence View: Cadence 02



4. Save and commit the workbook.

Table 4–3 lists the measures available on this view.

Table 4–3 Markdown Cadence View Measures

Measure	Description
Basis (Year/Item)	The basis of the cadence. Options are year and item. ▪ **Year**: Based on the absolute year. If the cadence is defined as starting on Week 36/10, it starts on Week 36 of the fiscal year. ▪ **Item**: Based on the lifecycle of the item. If the cadence is defined as starting on Week 36/10, it starts on the tenth week of the item lifecycle.
MD Clr U%	The markdown clearance percentage. This is applicable from the selected week onwards.

5

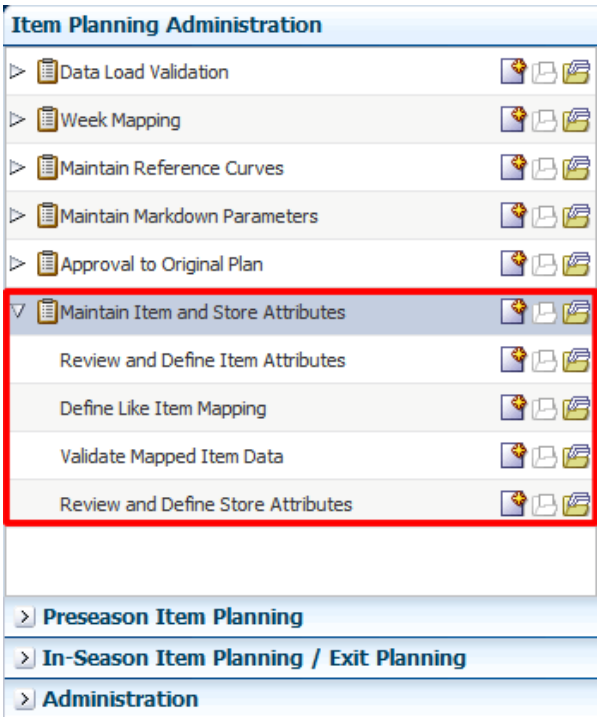
Maintain Item and Store Attributes

The Maintain Item and Store Attributes task allows you to map history and validate the results of mapping the history of a single item to a new item. This action provides a regular unit sales curve and quantity for reference when seeding and planning regular sales units.

The Maintain Item and Store Attributes task contains four steps:

- Review and Define Item Attributes Step
- Define Like Item Mapping Step
- Validate Mapping Step
- Review and Define Store Attributes Step

Figure 5–1 Maintain Item and Store Attributes Steps

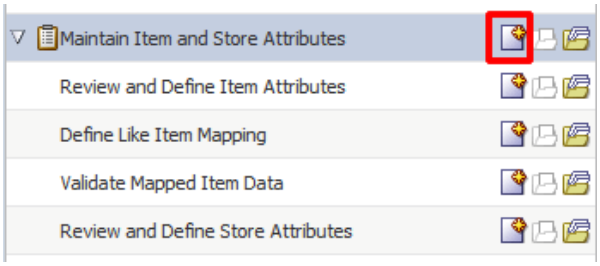


Building the Maintain Item and Store Attributes Workbook

To build a Maintain Item and Store Attributes workbook:

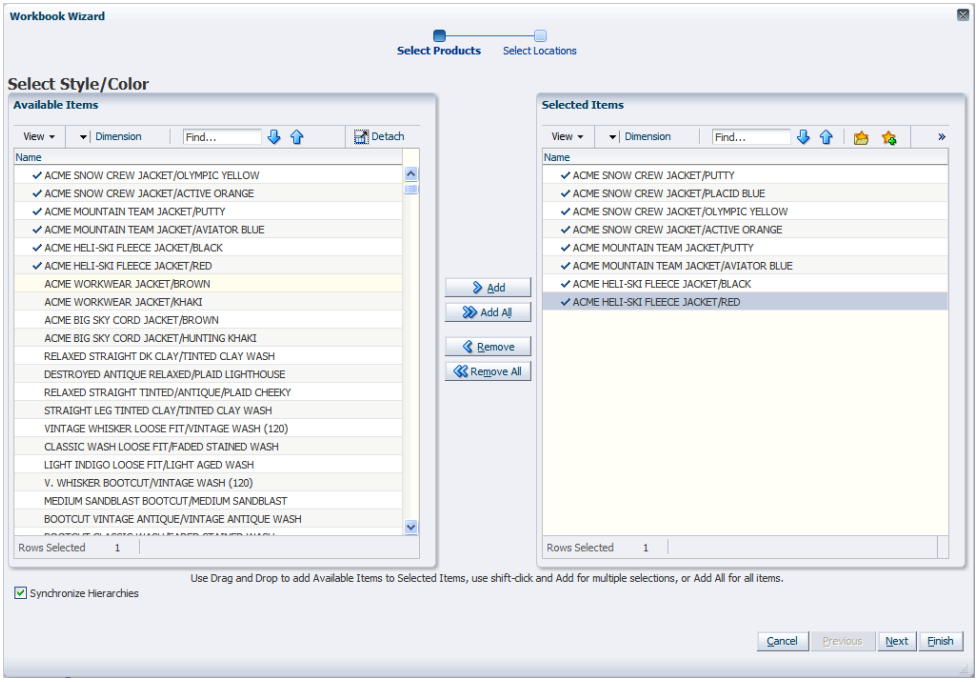
1. Click the **New Workbook** icon in the Maintain Item and Store Attributes task.

Figure 5–2 Maintain Item and Store Attributes Steps



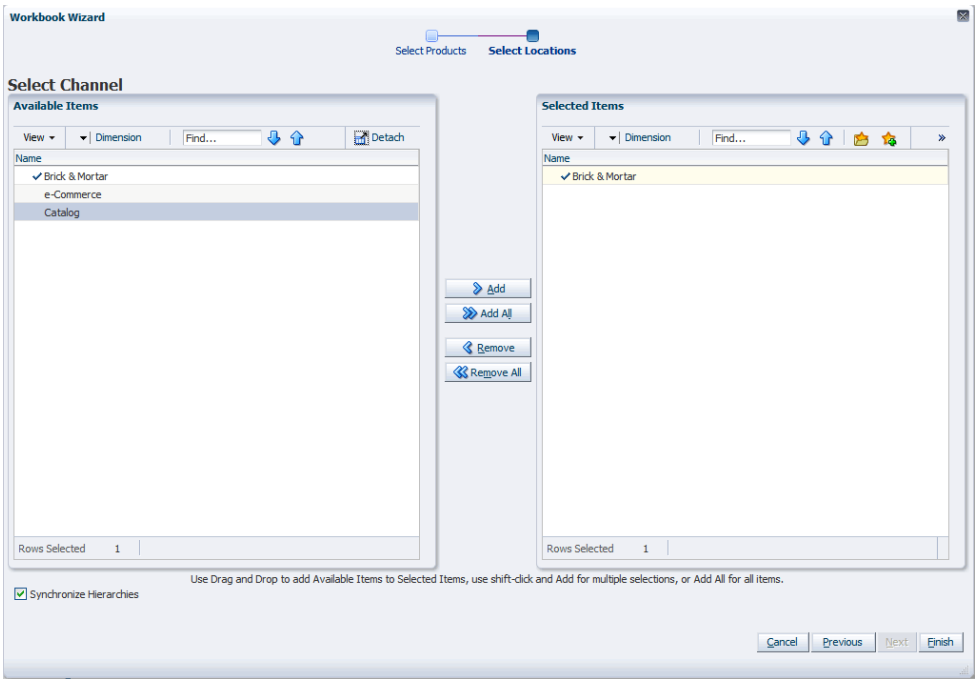
2. The Item and Store Maintenance wizard appears at the Select Style/Color step. Select the style/colors you want to map and click **Next**.

Figure 5–3 Maintain Item and Store Attributes Wizard: Select Style/Color



3. The Select Channel step appears. Select the channels you want to map and click **Finish**.

Figure 5–4 Maintain Item and Store Attributes Wizard: Select Channel

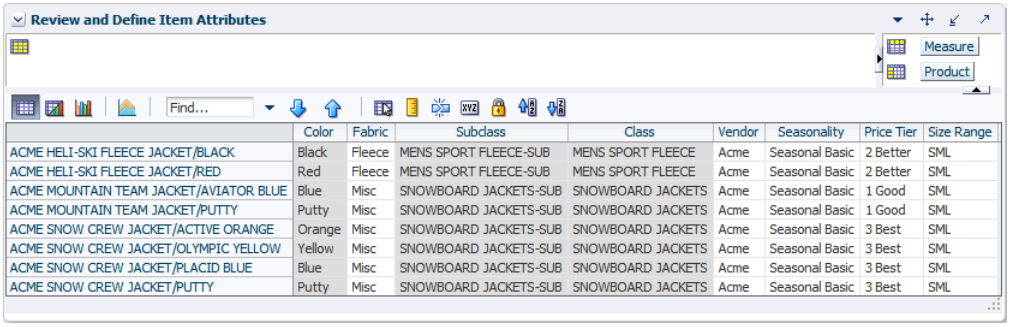


The workbook is built.

Review and Define Item Attributes Step

This step contains one view: Review and Define Item Attributes. Use this view to see the item attributes that were created in the Assortment Planning application. If you do not use Assortment Planning, use this view to enter item attributes and create placeholders for new items.

Figure 5–5 Review and Define Item Attributes View



	Color	Fabric	Subclass	Class	Vendor	Seasonality	Price Tier	Size Range
ACME HELI-SKI FLEECE JACKET/BLACK	Black	Fleece	MENS SPORT FLEECE-SUB	MENS SPORT FLEECE	Acme	Seasonal Basic	2 Better	SML
ACME HELI-SKI FLEECE JACKET/RED	Red	Fleece	MENS SPORT FLEECE-SUB	MENS SPORT FLEECE	Acme	Seasonal Basic	2 Better	SML
ACME MOUNTAIN TEAM JACKET/AVIATOR BLUE	Blue	Misc	SNOWBOARD JACKETS-SUB	SNOWBOARD JACKETS	Acme	Seasonal Basic	1 Good	SML
ACME MOUNTAIN TEAM JACKET/PUTTY	Putty	Misc	SNOWBOARD JACKETS-SUB	SNOWBOARD JACKETS	Acme	Seasonal Basic	1 Good	SML
ACME SNOW CREW JACKET/ACTIVE ORANGE	Orange	Misc	SNOWBOARD JACKETS-SUB	SNOWBOARD JACKETS	Acme	Seasonal Basic	3 Best	SML
ACME SNOW CREW JACKET/OLYMPIC YELLOW	Yellow	Misc	SNOWBOARD JACKETS-SUB	SNOWBOARD JACKETS	Acme	Seasonal Basic	3 Best	SML
ACME SNOW CREW JACKET/PLACID BLUE	Blue	Misc	SNOWBOARD JACKETS-SUB	SNOWBOARD JACKETS	Acme	Seasonal Basic	3 Best	SML
ACME SNOW CREW JACKET/PUTTY	Putty	Misc	SNOWBOARD JACKETS-SUB	SNOWBOARD JACKETS	Acme	Seasonal Basic	3 Best	SML

Table 5–1 describes the measures in this view.

Table 5–1 Review and Define Item Attributes View Measures

Measure	Description
Color	Display attributes of the item. This is read-only.
Fabric	Describes the fabric of the item. This is a user-defined string.
Subclass	Display attributes of the item. This is read-only.

Table 5–1 (Cont.) Review and Define Item Attributes View Measures

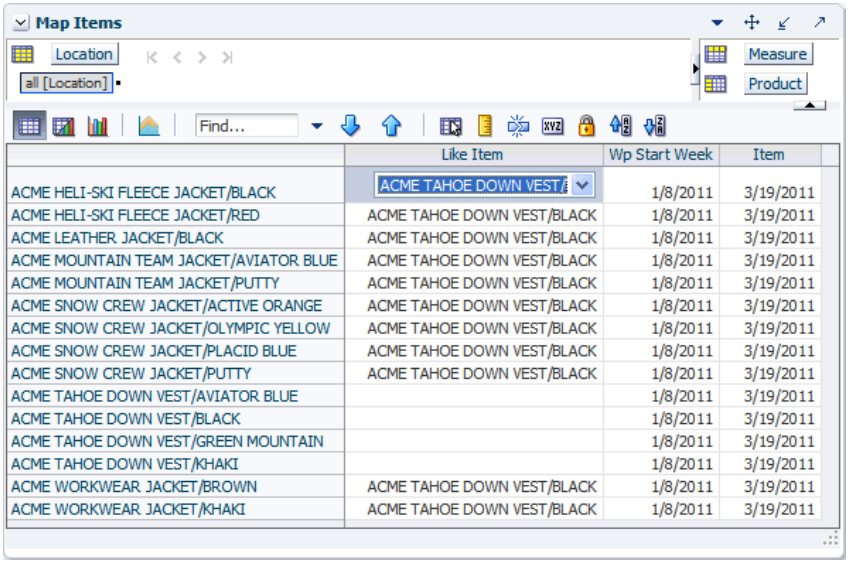
Measure	Description
Class	Display attributes of the item. This is read-only.
Vendor	Defines the vendor. This is a user-defined string.
Seasonality	Defines the seasonality of the item. The available options are loaded through the batch process.
Price Tier	Defines the price tier of the item. The available options are loaded through the batch process.
Size Range	Defines the kind of size range used for the item. The available options are loaded through the batch process.

Define Like Item Mapping Step

This step contains one view, Map Items. Use this view to map an item to a like item. This item uses the history of the like item. This is useful for new items that do not have sales history and are expected to have similar sales as the like item. After you have mapped the items, specify the start and end weeks for the mapped history. This selected date range is used for seeding the new item's history.

In order to map an item to a like item, you must build the workbook so that it contains both items.

Figure 5–6 Map Items View



	Like Item	Wp Start Week	Item
ACME HELI-SKI FLEECE JACKET/BLACK	ACME TAHOE DOWN VEST/	1/8/2011	3/19/2011
ACME HELI-SKI FLEECE JACKET/RED	ACME TAHOE DOWN VEST/BLACK	1/8/2011	3/19/2011
ACME LEATHER JACKET/BLACK	ACME TAHOE DOWN VEST/BLACK	1/8/2011	3/19/2011
ACME MOUNTAIN TEAM JACKET/AVIATOR BLUE	ACME TAHOE DOWN VEST/BLACK	1/8/2011	3/19/2011
ACME MOUNTAIN TEAM JACKET/PUTTY	ACME TAHOE DOWN VEST/BLACK	1/8/2011	3/19/2011
ACME SNOW CREW JACKET/ACTIVE ORANGE	ACME TAHOE DOWN VEST/BLACK	1/8/2011	3/19/2011
ACME SNOW CREW JACKET/OLYMPIC YELLOW	ACME TAHOE DOWN VEST/BLACK	1/8/2011	3/19/2011
ACME SNOW CREW JACKET/PLACID BLUE	ACME TAHOE DOWN VEST/BLACK	1/8/2011	3/19/2011
ACME SNOW CREW JACKET/PUTTY	ACME TAHOE DOWN VEST/BLACK	1/8/2011	3/19/2011
ACME TAHOE DOWN VEST/AVIATOR BLUE		1/8/2011	3/19/2011
ACME TAHOE DOWN VEST/BLACK		1/8/2011	3/19/2011
ACME TAHOE DOWN VEST/GREEN MOUNTAIN		1/8/2011	3/19/2011
ACME TAHOE DOWN VEST/KHAKI		1/8/2011	3/19/2011
ACME WORKWEAR JACKET/BROWN	ACME TAHOE DOWN VEST/BLACK	1/8/2011	3/19/2011
ACME WORKWEAR JACKET/KHAKI	ACME TAHOE DOWN VEST/BLACK	1/8/2011	3/19/2011

To map items, perform the following steps:

1. Ensure that **all[Location]** is visible in the calendar dimension. Like item mapping applies to all channels; therefore, it can only be selected at the all location level.
2. In the Like Item measure, select the item whose history you want to use for the new item.
3. In the Wp Start Week measure, select the starting date for the mapped history.
4. In the Item Mapping End Week measure, select the ending date for the mapped history. Only the data within the date range that you have created is mapped to the new item.

5. When finished mapping items, select the **Map Like Item** button in the upper right corner.

Figure 5–7 Map Like Item Button

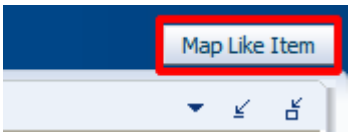


Table 5–2 describes the measures in this view.

Table 5–2 Map Items View Measures

Measure	Description
Like Item	Use this measure to select an item to use as the source to generate historical values for another item.
Wp Start Week	The working plan starting week. This is the first week of the like item history that should be assigned to the item.
Item Mapping End Week	The last week of mapping. This is the last week of the like item history that should be assigned to the item.

Validate Mapping Step

The Validate Mapping step contains a single view called Review Mapped Sales.

Use this view to review the items and item histories that you mapped in the Define Like Item Mapping Step.

Figure 5–8 Review Mapped Sales

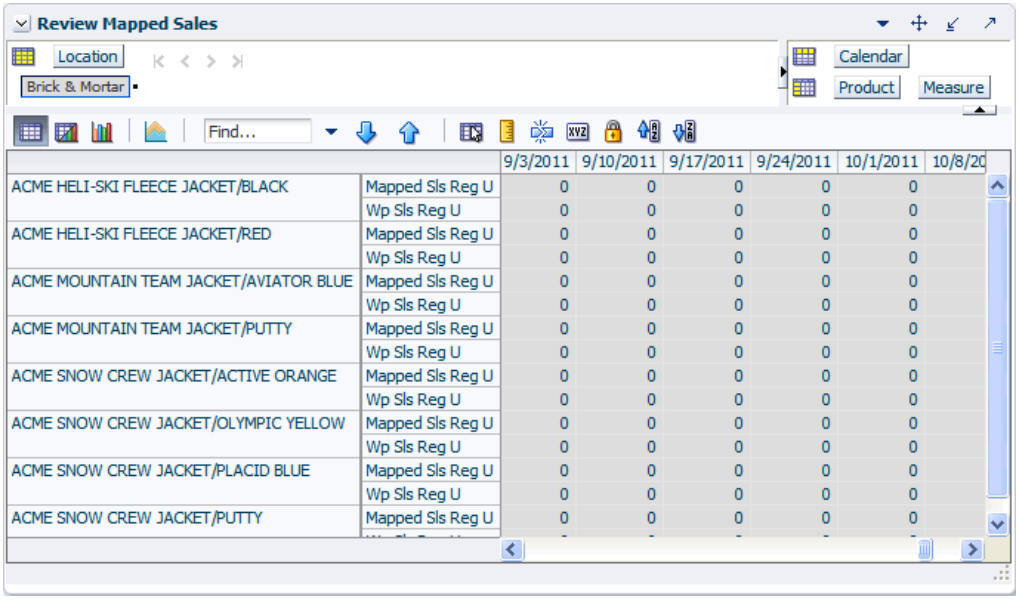


Table 5–3 describes the measures in this view.

Table 5–3 Review Mapped Sales View Measures

Measure	Description
Mapped Sls Reg U	Mapped history for regular sales units.
Wp Sls Reg U	Working plan for regular sales units.

Review and Define Store Attributes Step

This step contains a single view: Review and Define Store Attributes. Use this view to view the performance groups and size groups that were assigned to the store in the Assortment Planning application.

In Assortment Planning, the assortment planner creates a performance group and a size group for each class and buying period. This is why the calendar and product dimensions are shown in this view instead of just location. Because buying periods are not taken into account for performance groups in Item Planning, item planners typically use the performance group information for all weeks in the buying period. However, because performance groups are created at the class level in Assortment Planning, you can view the stores across classes. This is useful because a store belongs to different clusters for different classes.

Figure 5–9 Review and Define Store Attributes View

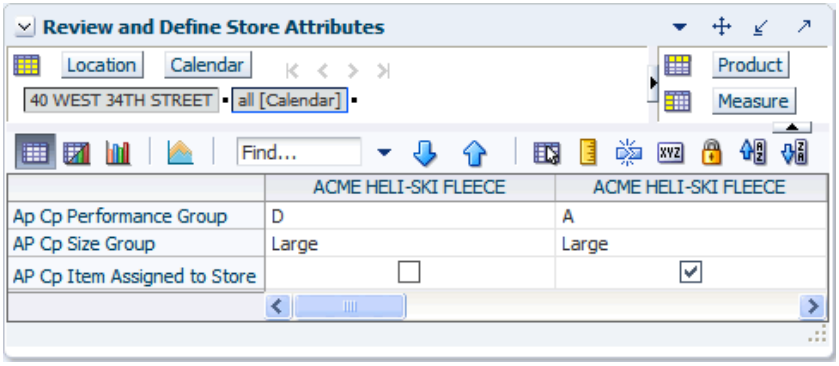


Table 5–4 describes the measures in this view.

Table 5–4 Review and Define Store Attributes Measures

Measure	Description
Ap Cp Performance Group	The performance group that the store was assigned to in Assortment Planning. Assortment planners assign a performance level or grade to a store to denote how well that store sells a particular class of products. The form of measure used to denote performance is determined by the assortment planner. Typical performance group formats: A, B, C; 1, 2, 3, and so on.
Ap Cp Size Group	The size group that the store was assigned to in Assortment Planning. Size groups are based on the floor space of the store. The form of measure used to denote the store size is determined by the assortment planner. Typical size group formats: small, medium, large; S, M, L; 1, 2, 3, and so on.
Ap Cp Item Assigned to Store	Denotes whether the product (class, subclass, style/color) is assigned to the store.

6

Develop and Approve Item Plans

During the preseason planning period, use the Develop and Approve Item Plans task to create item plans at the style/color level. This task has five steps:

- Review Assortment Plan Step
- Set Up Parameters to Seed Item Plans Step
- Assign Pricing Events Step
- Manage Item Plans and Promotional Lifts Step
- Review and Approve Item Plans Step

Figure 6–1 Develop and Approve Item Plans Task

Below is the general process of creating an item plan:

1. Optional: Consult the assortment plan created in the Assortment Planning application in the Review Assortment Plan Step.
2. Create a sales and markdown plan in the Set Up Parameters to Seed Item Plans Step.
3. Assign promotions to style/colors and review their promotional impact in the Assign Pricing Events Step.

4. Seed the plan in the Set Up Parameters to Seed Item Plans Step.
5. Review the sales and markdowns plan in the Review and Approve Item Plans Step.
6. Create a receipts and inventory plan and calculate the receipt flow in the Manage Item Plans and Promotional Lifts Task: Receipt and Inventory Plan.
7. Review the receipts and inventory plan in the Manage Item Plans and Promotional Lifts Task: Receipt and Inventory Plan.
8. Review the entire plan, compare it to the MFP targets, and approve the plan in the Review and Approve Item Plans Step.

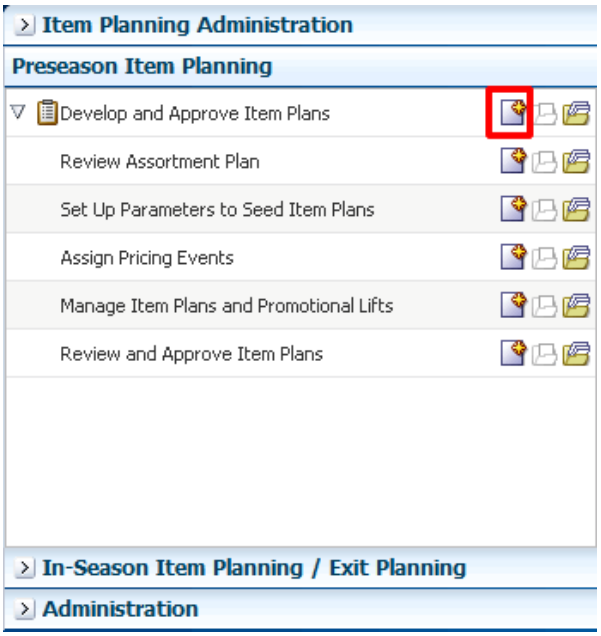
This process is described in detail throughout this chapter.

Building the Develop and Approve Item Plans Workbook

To build the Develop and Approve Item Plans workbook, perform the following steps.

1. Click the **Create New Workbook** icon in the Develop and Approve Item Plans task.

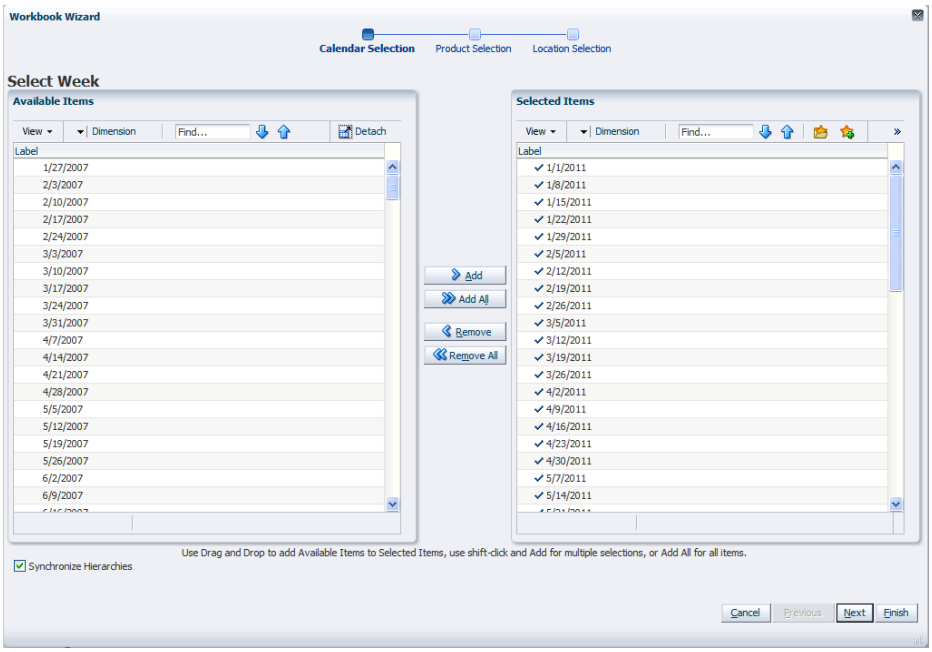
Figure 6–2 New Workbook Dialog Box



2. The workbook wizard opens at the Calendar Selection step. Select the weeks that you want to plan. Click **Next**.

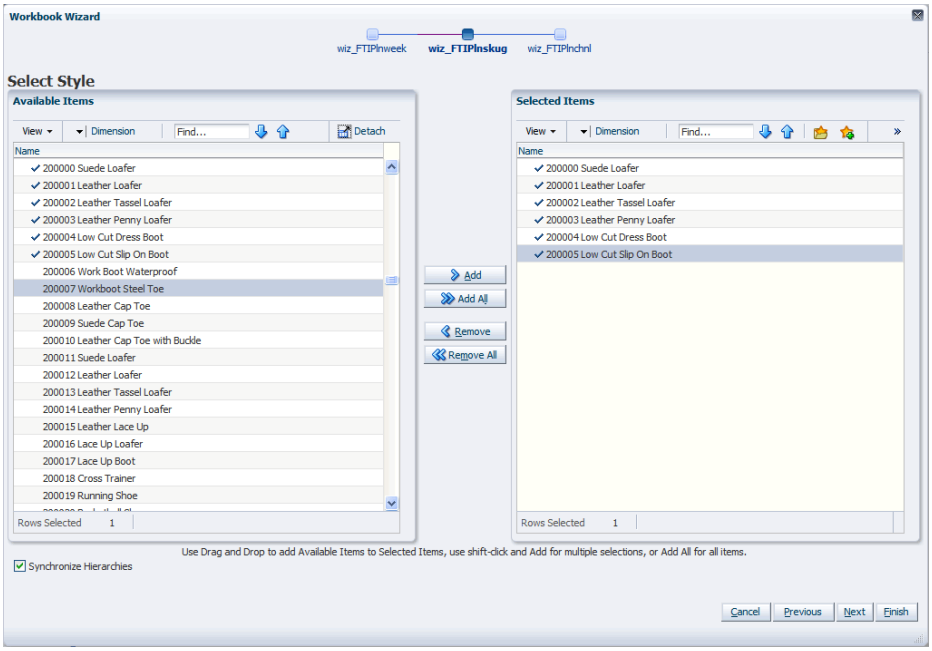
> **Note:** When choosing the weeks to include in the workbook, ensure that you accommodate for the receipt arrival week, not just the start sell week. For instance, if the start sell week is 1/15/2011, and the receipt time is two weeks, the workbook should start from 1/1/2011.

Figure 6–3 Workbook Wizard: Calendar Selection



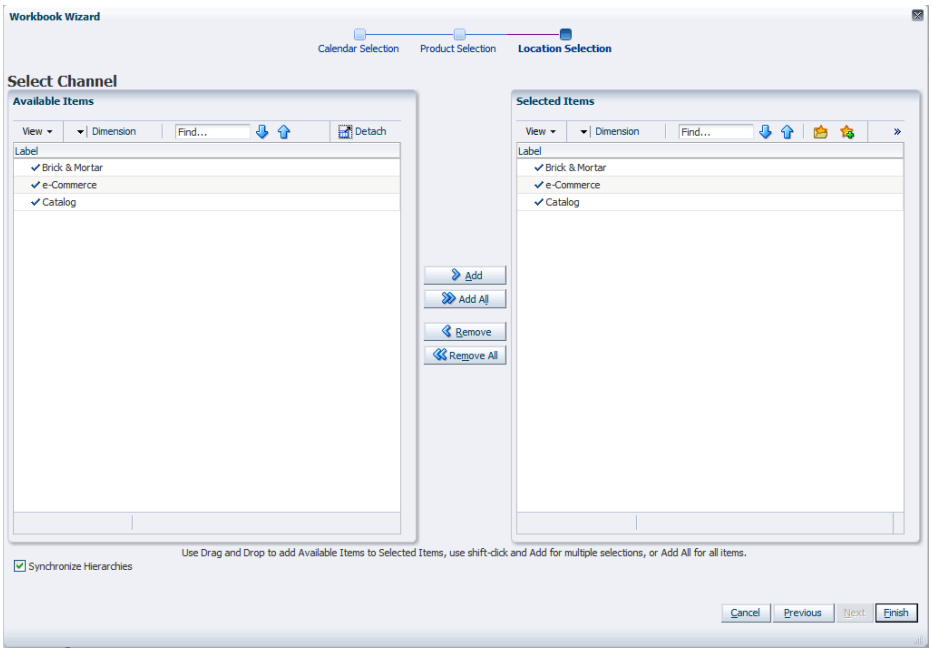
3. The Product Selection step of the workbook wizard appears. Select the styles you want to plan. Click **Next**.

Figure 6–4 Workbook Wizard: Product Selection



4. The Location Selection step of the workbook wizard appears. Select the channels you want to plan. Click **Finish**.

Figure 6–5 Workbook Wizard: Location Selection



The workbook is built.

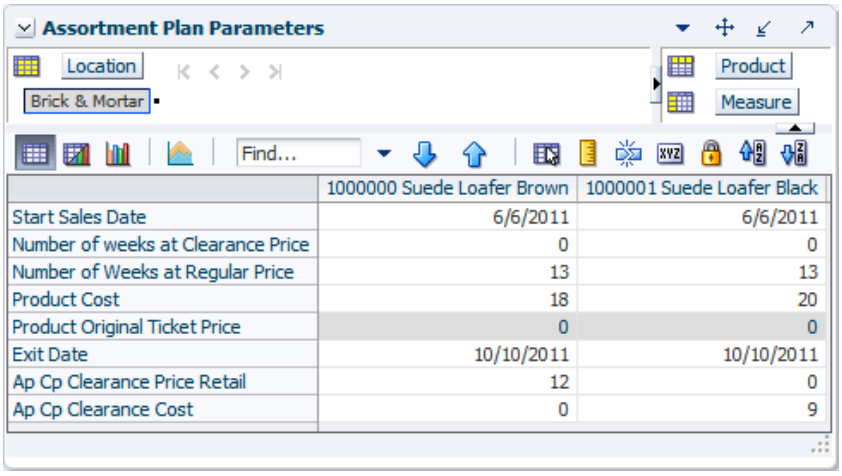
Review Assortment Plan Step

Review the views in the Assortment Plan step if you have loaded data from the Assortment Planning application. If you do not use Assortment Planning, continue to the Set Up Parameters to Seed Item Plans Step.

Assortment Plan Parameters View

Use the Review Assortment Plan Parameters view to reference the parameters that the Assortment Planning user set for the same style/colors you are planning. When seeding your working plan in the Item Plan Parameters View, you can choose to seed with this Assortment Plan data.

Figure 6–6 Assortment Plan Parameters View



	1000000 Suede Loafer Brown	1000001 Suede Loafer Black
Start Sales Date	6/6/2011	6/6/2011
Number of weeks at Clearance Price	0	0
Number of Weeks at Regular Price	13	13
Product Cost	18	20
Product Original Ticket Price	0	0
Exit Date	10/10/2011	10/10/2011
Ap Cp Clearance Price Retail	12	0
Ap Cp Clearance Cost	0	9

Table 6–1 Assortment Plan Parameters View Measures

Measure	Description
Start Sales Date	The date the product is expected to start selling.
Number of weeks at Clearance Price	Number of weeks the item is expected to sell at Clearance Price.
Number of Weeks at Regular Price	Number of weeks the item is expected to sell at Regular Price.
Product Cost	The cost of the product.
Product Original Ticket Price	Initial retail of product.
Exit Date	The date that the product should be removed from the sales floor.
Ap Cp Clearance Price Retail	The clearance price set up in Assortment Planning.
Ap Cp Clearance Cost	The clearance cost set up in Assortment Planning.

Assortment Plan Details View

Use the Assortment Plan Details view to see the plan that was created in the Assortment Planning application for the same style/colors you are planning.

Figure 6–7 Assortment Plan Details View

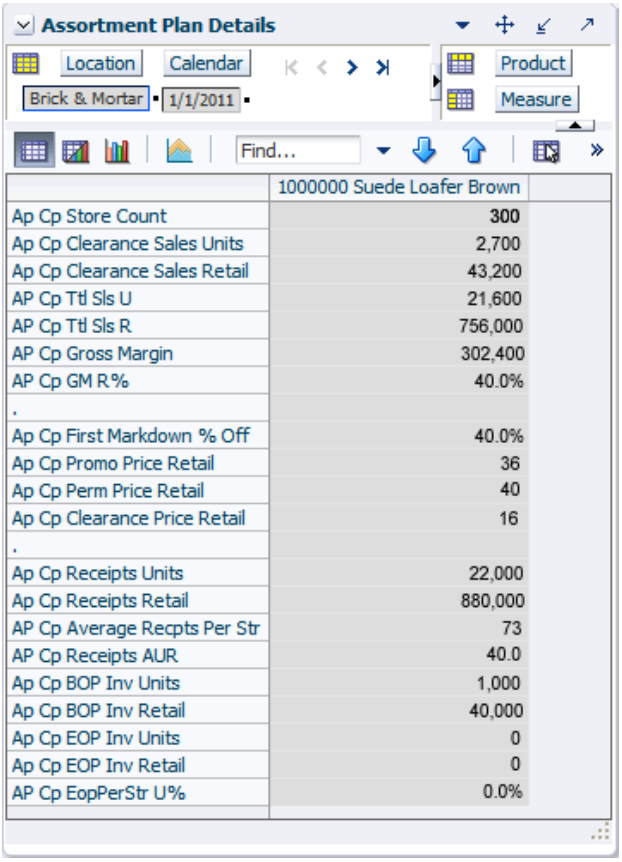


Table 6–2 lists the measures available on this view.

Table 6–2 Assortment Plan View Step Measures

Measure	Description
Ap Cp Store Count	The number of stores for which this style/color is planned for in the approved plan from the Assortment Planning application.
Ap Cp Clearance Sales Units	Assortment Planning Current Plan Clearance Sales units.
Ap Cp Clearance Sales Retail	Assortment Planning Current Plan Clearance Sales retail.
Ap Cp Ttl Sls U	Assortment Planning Current Plan Total Sales Units.
Ap Cp Ttl Sls R	Assortment Planning Current Plan Total Sales Retail.
AP Cp Gross Margin	Assortment Planning Current Plan Gross Margin.
Ap Cp GM R%	Assortment Planning Current Plan Gross Margin rate.
Ap Cp First Markdown % Off	Initial Markdown Taken expressed as a rate.
Ap Cp Promo Price Change %	Assortment Planning Current Plan Promotional Price Change %.
Ap Cp Perm Price Change %	Permanent Price Change expressed as a rate.
Ap Cp Clearance Price Retail	Assortment Planning Current Plan Clearance Price Change %.
Ap Cp Receipts Units	Receipts expressed as Units.
Ap Cp Receipts Retail	Assortment Planning Current Plan Receipts Retail.
AP Cp Average Recpts Per Str	Assortment Planning Current Plan Average Receipts per store.
AP Cp Receipts AUR	Assortment Planning Current Plan Receipts Average Unit Retail.
Ap Cp BOP Inv Units	The Beginning of Period inventory units from Assortment Planning's current plan.
Ap Cp BOP Inv Retail	The Beginning of Period inventory retail from Assortment Planning's current plan.
Ap Cp EOP Inv Retail	The End of Period inventory retail.
Ap Cp EOP Inv Units	The End of Period inventory units.
AP Cp EopPerStr U%	Assortment Planning Current Plan End of Period Per Store Unit %.

After you have reviewed the parameters from the Assortment Planning application, continue to the Set Up Parameters to Seed Item Plans Step to set your own parameters.

Set Up Parameters to Seed Item Plans Step

Use the views in this step to create a weekly plan for the style/colors. This step has three views:

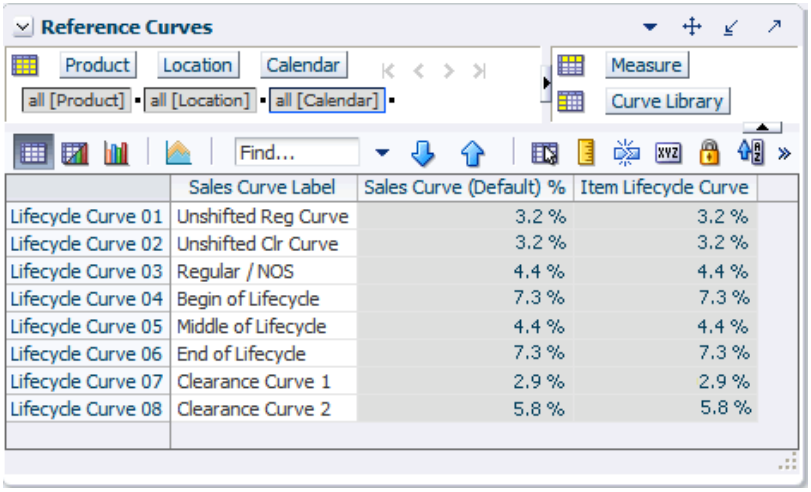
- Reference Curves View
- Item Plan Parameters View
- Seed View

Reference Curves View

Use this view to review the reference curves you created in the Maintain Reference Curves task. This view is for reference only. It is provided to help you assign these curves to the style/colors being planned. To edit the curves, return to the Maintain Curve Profiles View.

Note: To view the data in the Sales Curve Label and Sales Curve (Default) % measures, ensure that the calendar hierarchy includes the all[Calendar] dimension and that the location hierarchy displays only the all[Location] dimension.

Figure 6–8 Reference Curves View



	Sales Curve Label	Sales Curve (Default) %	Item Lifecycle Curve
Lifecycle Curve 01	Unshifted Reg Curve	3.2 %	3.2 %
Lifecycle Curve 02	Unshifted Clr Curve	3.2 %	3.2 %
Lifecycle Curve 03	Regular / NOS	4.4 %	4.4 %
Lifecycle Curve 04	Begin of Lifecycle	7.3 %	7.3 %
Lifecycle Curve 05	Middle of Lifecycle	4.4 %	4.4 %
Lifecycle Curve 06	End of Lifecycle	7.3 %	7.3 %
Lifecycle Curve 07	Clearance Curve 1	2.9 %	2.9 %
Lifecycle Curve 08	Clearance Curve 2	5.8 %	5.8 %

Table 6–3 lists the measures available on this view.

Table 6–3 Reference Curves View Measures

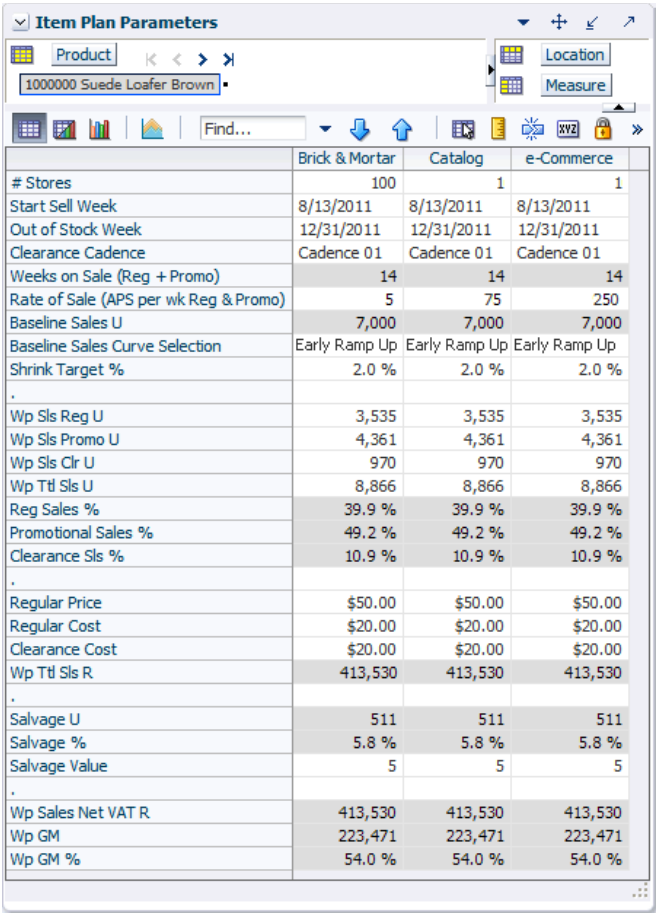
Measure	Description
Sales Curve Label	Displays the label for the lifecycle curve. This label is created in the Maintain Reference Curves task.
Sales Curve (Default)%	Displays percent-to-total sales percentage in the weeks of the curve. This is set in the Maintain Reference Curves task.
Item Lifecycle Curve	Displays the sales curve for the item.

Next, continue to the Item Plan Parameters View.

Item Plan Parameters View

Use this view to set the parameters of the item plan. This creates the weekly sales unit plan.

Figure 6–9 Item Plan Parameters - Sales Parameters Measure Profile



Item Plan Parameters

Product: 1000000 Suede Loafer Brown

Location

Measure

Find...

	Brick & Mortar	Catalog	e-Commerce
# Stores	100	1	1
Start Sell Week	8/13/2011	8/13/2011	8/13/2011
Out of Stock Week	12/31/2011	12/31/2011	12/31/2011
Clearance Cadence	Cadence 01	Cadence 01	Cadence 01
Weeks on Sale (Reg + Promo)	14	14	14
Rate of Sale (APS per wk Reg & Promo)	5	75	250
Baseline Sales U	7,000	7,000	7,000
Baseline Sales Curve Selection	Early Ramp Up	Early Ramp Up	Early Ramp Up
Shrink Target %	2.0 %	2.0 %	2.0 %
.			
Wp Sls Reg U	3,535	3,535	3,535
Wp Sls Promo U	4,361	4,361	4,361
Wp Sls Clr U	970	970	970
Wp Ttl Sls U	8,866	8,866	8,866
Reg Sales %	39.9 %	39.9 %	39.9 %
Promotional Sales %	49.2 %	49.2 %	49.2 %
Clearance Sls %	10.9 %	10.9 %	10.9 %
.			
Regular Price	$50.00	$50.00	$50.00
Regular Cost	$20.00	$20.00	$20.00
Clearance Cost	$20.00	$20.00	$20.00
Wp Ttl Sls R	413,530	413,530	413,530
.			
Salvage U	511	511	511
Salvage %	5.8 %	5.8 %	5.8 %
Salvage Value	5	5	5
.			
Wp Sales Net VAT R	413,530	413,530	413,530
Wp GM	223,471	223,471	223,471
Wp GM %	54.0 %	54.0 %	54.0 %

To set the item plan parameters, perform the following steps:

1. In the # Stores measure, enter the number of stores.
2. Define the start sell and out of stock weeks in the Start Sell Week and Out of Stock Week measures.
3. In the Clearance Cadence measure, select the cadence to be applied to the style/color. These cadences are created in the Maintain Markdown Parameters task.
4. In the Rate of Sale measure, enter the average units of the style/color that are sold per store, per week. (This is used for baseline sales calculation. It is useful when seeding dales to weeks).
5. Click **Calculate**. The Baseline Sales U measure is calculated. This measure displays the baseline sales units for the regular and promotional period.
6. In the Baseline Sales Curve Selection measure, select the reference curve to apply to the style/color. These reference curves are created in the Maintain Reference Curves task.
7. In the Shrink Target %, enter the planned shrink for the style/color. Each week is a planned shrink that is based on a certain percentage of sales for the week.
8. In the Regular Price, Regular Cost, and Clearance Cost measures, enter the price, cost, and clearance cost of the style/color.
9. Click **Calculate**.

10. In the Salvage Value measure, enter the amount that the style/color is worth in the last week of the salvage period. The salvage period is when the style/color has reached the end of its life. Therefore, the salvage value is the price you can recover by selling this item to a clearance channel.
11. If you are computing value added tax, edit the Wp Sales Net VAT R measure if needed.

After you have set the parameters, continue to the Seed View to seed these parameters into the item plan for the style/color.

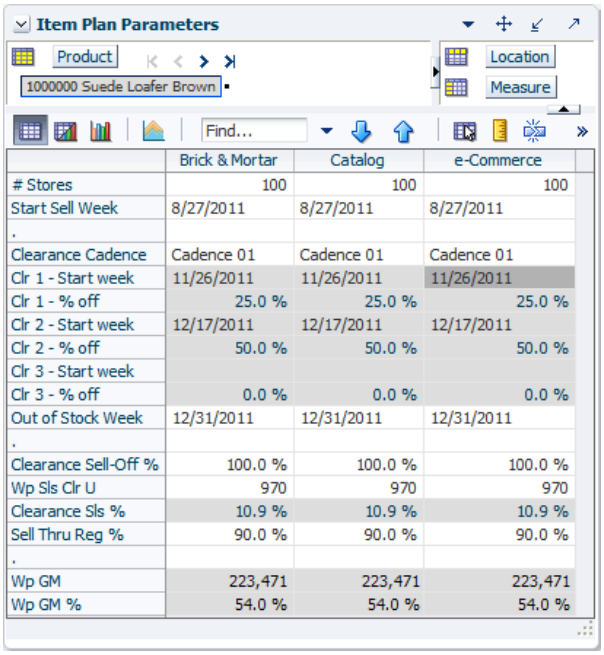
Note: If the style/color belongs to a promotion, you should map the promotions to the style/color in the Assign Pricing Events Step before seeding.

Item Plan Parameters View - Measure Profiles

Along with the Sales Parameter measures profile, the Item Plan Parameters view also includes the following measure profiles:

- Receipt Parameters - See Item Plan Parameters View: Receipt Parameters Measure Profile
- Markdown Parameters - See the figure (Figure 6–10) below.

Figure 6–10 Item Plan Parameters - Markdown Parameters Measure Profile



	Brick & Mortar	Catalog	e-Commerce
# Stores	100	100	100
Start Sell Week	8/27/2011	8/27/2011	8/27/2011
.			
Clearance Cadence	Cadence 01	Cadence 01	Cadence 01
Clr 1 - Start week	11/26/2011	11/26/2011	11/26/2011
Clr 1 - % off	25.0 %	25.0 %	25.0 %
Clr 2 - Start week	12/17/2011	12/17/2011	12/17/2011
Clr 2 - % off	50.0 %	50.0 %	50.0 %
Clr 3 - Start week			
Clr 3 - % off	0.0 %	0.0 %	0.0 %
Out of Stock Week	12/31/2011	12/31/2011	12/31/2011
.			
Clearance Sell-Off %	100.0 %	100.0 %	100.0 %
Wp Sls Clr U	970	970	970
Clearance Sls %	10.9 %	10.9 %	10.9 %
Sell Thru Reg %	90.0 %	90.0 %	90.0 %
.			
Wp GM	223,471	223,471	223,471
Wp GM %	54.0 %	54.0 %	54.0 %

Seed View

Use this view to seed the item plan with data. This creates a demand curve on which to spread the initial targets of the item plan. You can seed with any of the following options:

- LY: Last year's data.
- Adj LY: Adjusted last year's data.
- AP: Data from the Assortment Planning (AP) application. If you use AP and you have loaded the AP data into Item Planning, you can review this data in the Review Assortment Plan Step.
- Parameters: The parameters that you have created in the Item Plan Parameters View.
- Accepted Price Plan: This option is used only in the Item Planning Configured for COE application.

Or, you can instead choose to not seed the plan, which allows you to create a plan manually by keying in sales at a weekly level.

Figure 6–11 Seed View

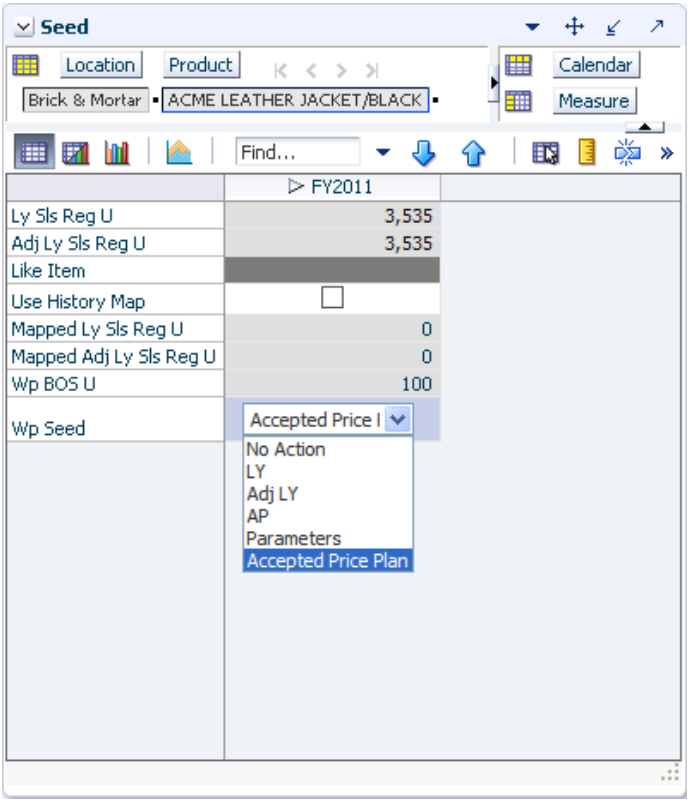


Table 6–4 lists the measures available on this view.

Table 6–4 Seed View Measures

Measure	Description
Ly Sls Reg U	The regular units from last year's sales.
Adj Ly Sls Reg U	The adjusted regular units from last year's sales.

Table 6–4 (Cont.) Seed View Measures

Measure	Description
Like Item	The style/color that you mapped the current style/color to in the Maintain Item and Store Attributes task.
Use History Map	Select this option to use the history of the style that you mapped the current style to in the Maintain Item and Store Attributes task.
Mapped Ly Sls Reg U	The regular units from last year's sales of the like item.
Mapped Adj Ly Sls Reg U	The adjusted regular units from last year's sales of the like item.
Wp BOS U	The planned Beginning of Season total units.
Wp Seed	The source used to seed the working plan. Use the dropdown to select the source to use for seeding.

Seeding the Plan

To seed the plan, perform the following steps:

1. Roll the calendar dimension up to year.
2. Select the style/color you want to seed in the product dimension.
3. In the Wp Seed measure, choose the seed option.
4. Select **Use Hist Map** if you want to use the data of the like item shown in the Like Item measure.
5. When you have selected all the data you want to seed, click the **Seed** button in the upper right corner.

Figure 6–12 Seed Button

6. A confirmation message appears, stating that the data has been successfully seeded. Click **OK**.

Figure 6–13 Seeding Success Message

After you have seeded, continue to the Review and Approve Item Plans View to approve the plan.

Assign Pricing Events Step

The Assign Pricing Events step contains four views that help you map style/colors to promotions:

- Promotions Definition View
- Promotions Weeks View
- Promo Mapping View
- Markdown Cadence View

Use the Promo Mapping View to map the style/colors and promotions. Use the other views as references about the promotions and markdown cadences.

Promotions Definition View

Use this view to review the lift and the lift override for the promotions. This view is read-only.

Figure 6–14 Promotions Definition View

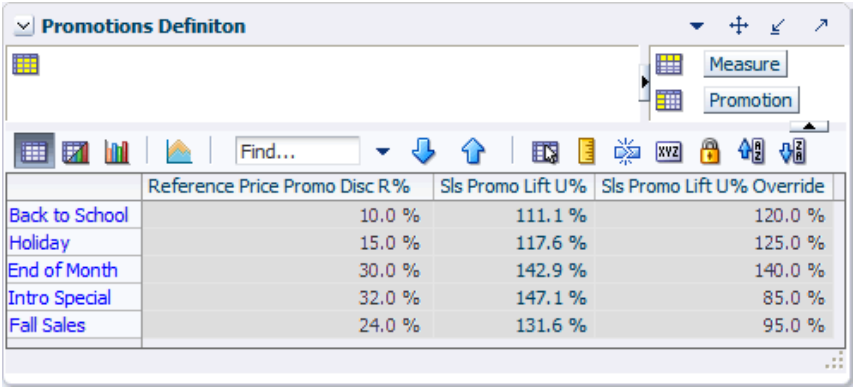


Table 6–5 lists the measures available on this view.

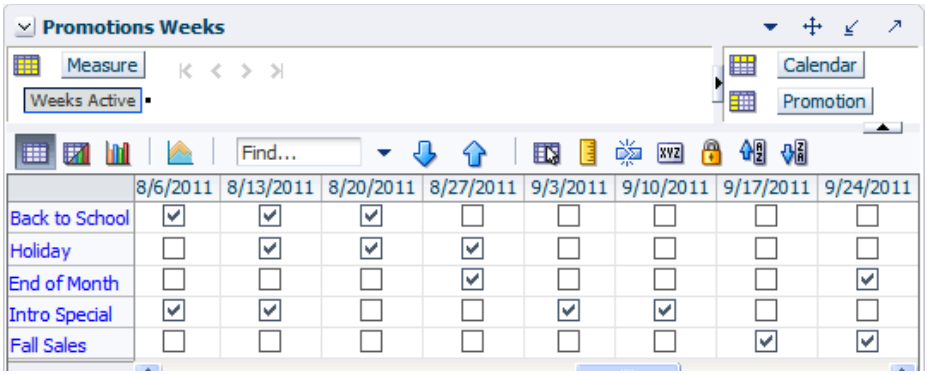
Table 6–5 Promotions Definition View Measures

Measure	Description
Reference Price Promo Disc R%	The promotional markdown discount. It represents the temporary reduction to the owned inventory price for promotional purposes. Expressed as a percentage of retail.
Sls Promo Lift U%	The promotional lift. This is the percent of increased sales that must occur to overcome the decrease in price to sell the same dollar amount.
Sls Promo Lift U% Override	The lift entered in this measure overrides the lift calculated in the Sls Promo Lift U% measure.

Promotions Weeks View

Use this view to review the promotion periods. This view is read-only.

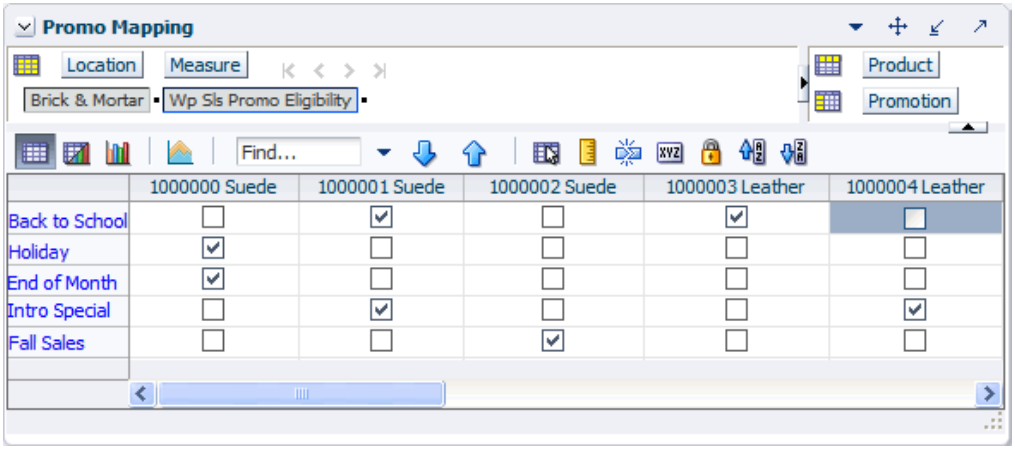
Figure 6–15 Promotions Weeks View



Promo Mapping View

Use this view to map the style/color to the promotions it belongs to. Style/colors can belong to more than one promotion, even if the promotions overlap.

Figure 6–16 Promo Mapping View



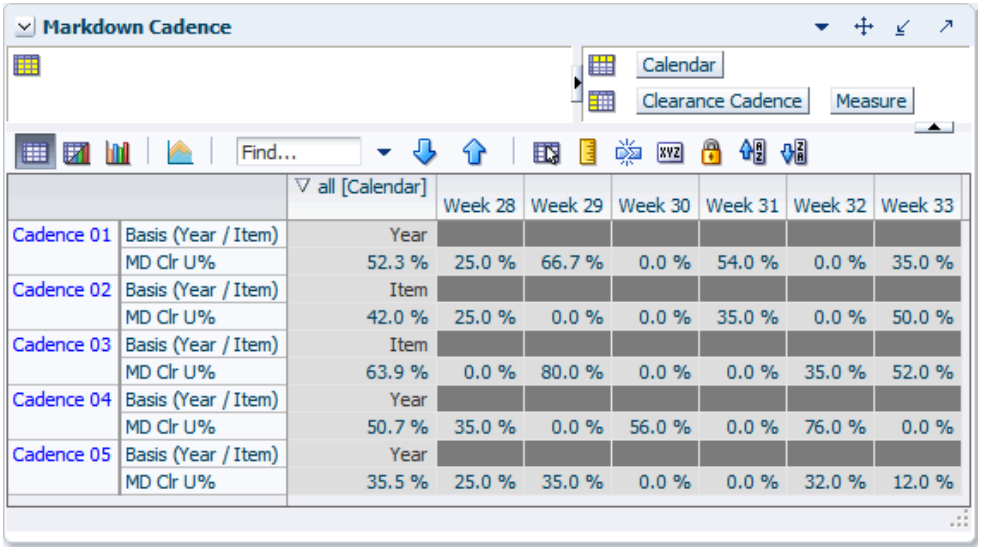
To map a style/color to a promotion, click the check box. You may select more than one promotion for a style/color.

Markdown Cadence View

Use this view to review the markdown cadences you created in the Markdown Cadence View. This view is read-only.

Note: To see the Basis (Year/Item) measure data, ensure that all[Calendar] is displayed in the calendar hierarchy.

Figure 6–17 Markdown Cadence View



		all [Calendar]	Week 28	Week 29	Week 30	Week 31	Week 32	Week 33
Cadence 01	Basis (Year / Item)	Year						
	MD Clr U%	52.3 %	25.0 %	66.7 %	0.0 %	54.0 %	0.0 %	35.0 %
Cadence 02	Basis (Year / Item)	Item						
	MD Clr U%	42.0 %	25.0 %	0.0 %	0.0 %	35.0 %	0.0 %	50.0 %
Cadence 03	Basis (Year / Item)	Item						
	MD Clr U%	63.9 %	0.0 %	80.0 %	0.0 %	0.0 %	35.0 %	52.0 %
Cadence 04	Basis (Year / Item)	Year						
	MD Clr U%	50.7 %	35.0 %	0.0 %	56.0 %	0.0 %	76.0 %	0.0 %
Cadence 05	Basis (Year / Item)	Year						
	MD Clr U%	35.5 %	25.0 %	35.0 %	0.0 %	0.0 %	32.0 %	12.0 %

Table 6–6 lists the measures available on this view.

Table 6–6 Markdown Cadence View Measures

Measure	Description
MD Clr U%	The markdown clearance percentage starting from the week of the year or the style/color's lifecycle.
Basis (Year/Item)	The basis that the cadence is based on. Options are year and item.

Manage Item Plans and Promotional Lifts Step

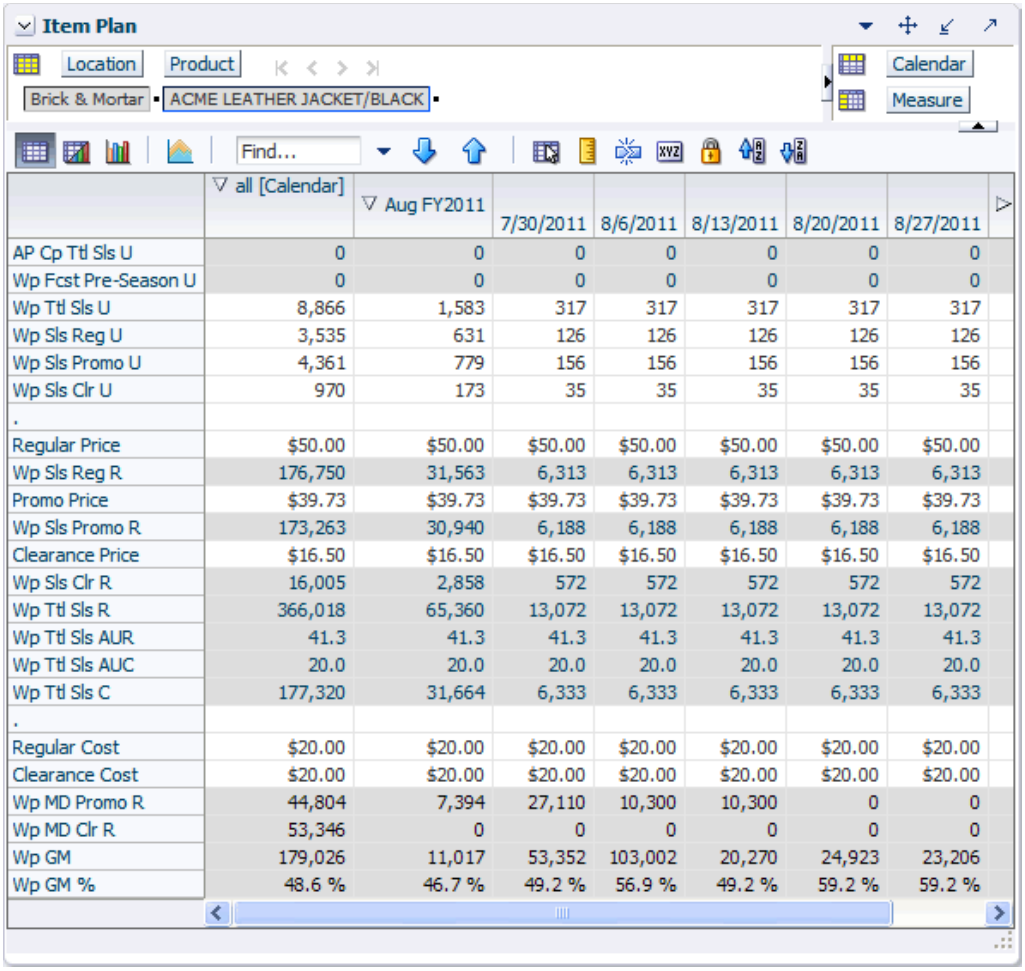
The views in this step display the weekly plan for the sales and markdowns that was created by the parameters you have set so far. Use these views to review the plan:

- Item Plan View
- Promo Details View

Item Plan View

Use this view to review the weekly plan for the sales and markdowns that has been created by all of the parameters and promotions you have created so far. If you need to adjust the plan, return to the Item Plan Parameters View to adjust the parameters, seed from parameters in the Seed View, and then return to this view to review the results. Continue this process until you are satisfied with the sales and markdown plan.

Figure 6–18 Item Plan View



	all [Calendar]	Aug FY2011	7/30/2011	8/6/2011	8/13/2011	8/20/2011	8/27/2011
AP Cp Ttl Sls U	0	0	0	0	0	0	0
Wp Fcst Pre-Season U	0	0	0	0	0	0	0
Wp Ttl Sls U	8,866	1,583	317	317	317	317	317
Wp Sls Reg U	3,535	631	126	126	126	126	126
Wp Sls Promo U	4,361	779	156	156	156	156	156
Wp Sls Clr U	970	173	35	35	35	35	35
.							
Regular Price	$50.00	$50.00	$50.00	$50.00	$50.00	$50.00	$50.00
Wp Sls Reg R	176,750	31,563	6,313	6,313	6,313	6,313	6,313
Promo Price	$39.73	$39.73	$39.73	$39.73	$39.73	$39.73	$39.73
Wp Sls Promo R	173,263	30,940	6,188	6,188	6,188	6,188	6,188
Clearance Price	$16.50	$16.50	$16.50	$16.50	$16.50	$16.50	$16.50
Wp Sls Clr R	16,005	2,858	572	572	572	572	572
Wp Ttl Sls R	366,018	65,360	13,072	13,072	13,072	13,072	13,072
Wp Ttl Sls AUR	41.3	41.3	41.3	41.3	41.3	41.3	41.3
Wp Ttl Sls AUC	20.0	20.0	20.0	20.0	20.0	20.0	20.0
Wp Ttl Sls C	177,320	31,664	6,333	6,333	6,333	6,333	6,333
.							
Regular Cost	$20.00	$20.00	$20.00	$20.00	$20.00	$20.00	$20.00
Clearance Cost	$20.00	$20.00	$20.00	$20.00	$20.00	$20.00	$20.00
Wp MD Promo R	44,804	7,394	27,110	10,300	10,300	0	0
Wp MD Clr R	53,346	0	0	0	0	0	0
Wp GM	179,026	11,017	53,352	103,002	20,270	24,923	23,206
Wp GM %	48.6 %	46.7 %	49.2 %	56.9 %	49.2 %	59.2 %	59.2 %

Promo Details View

This view displays the baseline sales and promotional lift units for the style/color. The baseline sales units measure, Wp Baseline Sales U, displays the number of units that would be sold if no promotions existed. The promotional lift units measure, Wp Promo Lift U, displays the number of additional units that would be sold with the promotion. The Wp Sls Promo U measure is the total units that would be sold. It combines the baseline sales units and the promotional lift units.

Figure 6–19 Promo Details View

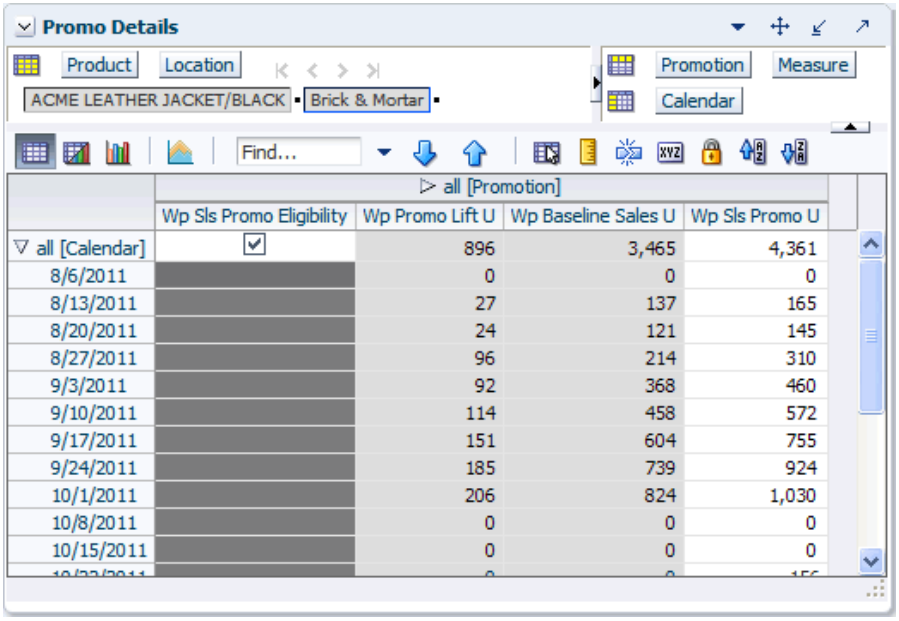


Figure 6–20 Promo Detail View for Back to School Promotion

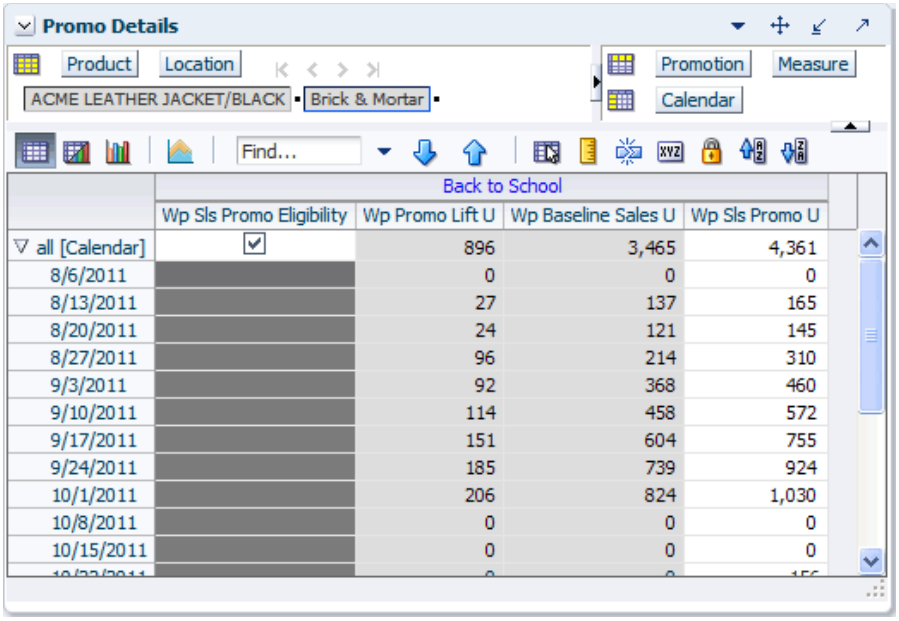


Figure 6–21 Promo Details View for the Fall Sales Promotion

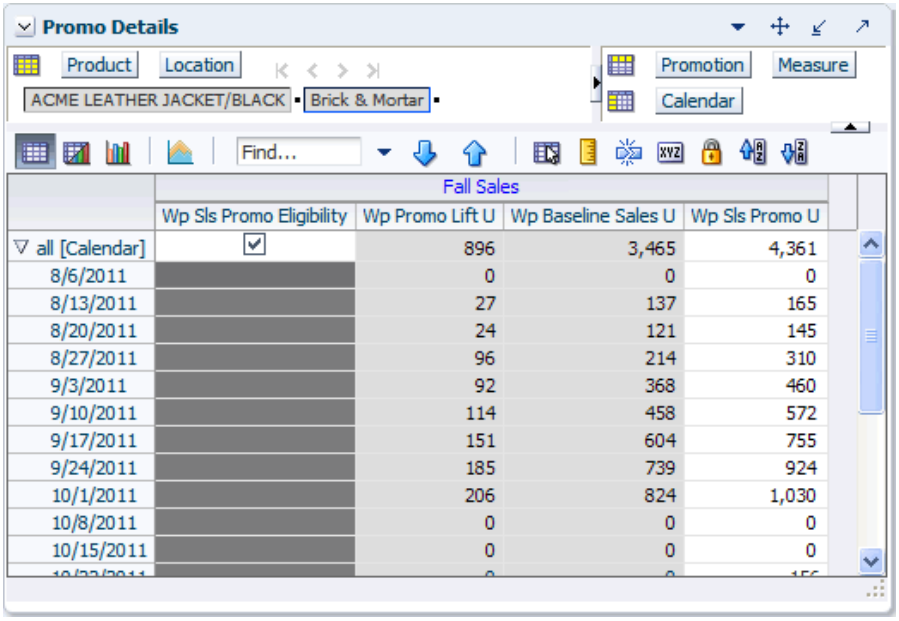


Table 6–7 Promo Details View Measures

Measure	Description
Wp Sls Promo Eligibility	By selecting this boolean, the promotion is being associated to the style/color. You must seed from parameters to apply the promotional details to their style/color plan after selecting this boolean.
Wp Promo Lift U	Displays the number of additional units sold with the promotion.
Wp Baseline Sales U	Displays the number of units sold if no promotions existed.
Wp Sls Promo U	Displays the total units sold. This measure combines the baseline sales units and the promotional lift units.

Once you are satisfied with the sales plan, return to the Set Up Parameters to Seed Plan Task: Receipt and Inventory Plan to create the receipt and inventory plan.

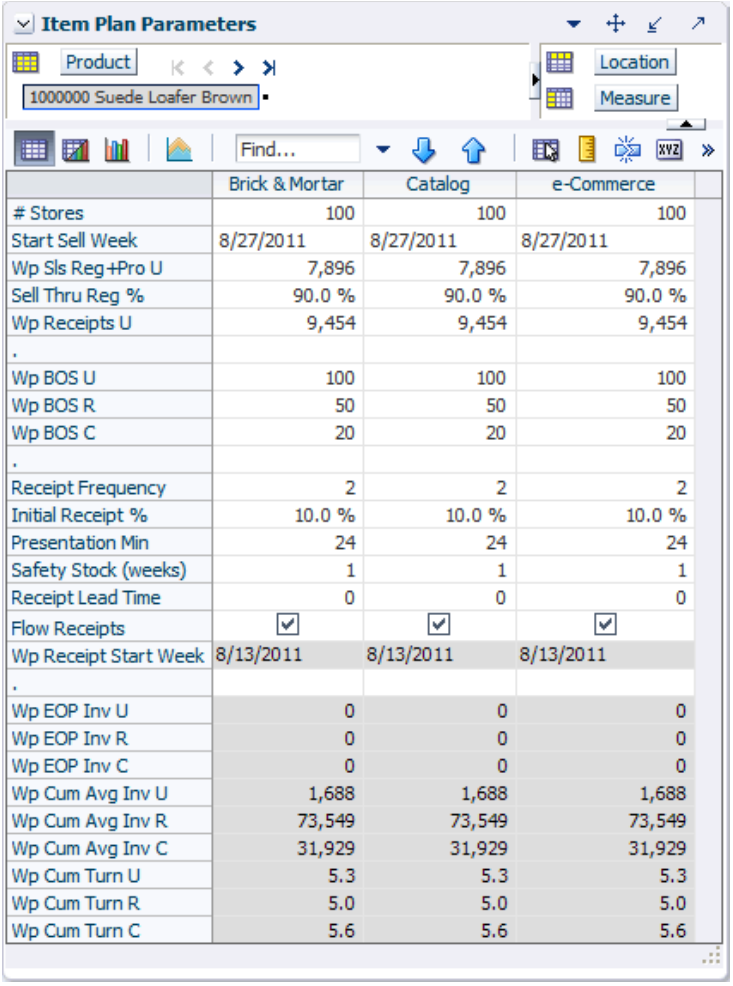
Set Up Parameters to Seed Plan Task: Receipt and Inventory Plan

After you have developed the sales and inventory plan, use the Item Plan Parameters view to create the receipt and inventory plan.

Item Plan Parameters View: Receipt Parameters Measure Profile

Use the receipt parameters measure profile in this view to develop the receipt and inventory plan.

Figure 6–22 Item Plan Parameters View: Receipt Parameters Measure Profile



	Brick & Mortar	Catalog	e-Commerce
# Stores	100	100	100
Start Sell Week	8/27/2011	8/27/2011	8/27/2011
Wp Sls Reg+Pro U	7,896	7,896	7,896
Sell Thru Reg %	90.0 %	90.0 %	90.0 %
Wp Receipts U	9,454	9,454	9,454
.			
Wp BOS U	100	100	100
Wp BOS R	50	50	50
Wp BOS C	20	20	20
.			
Receipt Frequency	2	2	2
Initial Receipt %	10.0 %	10.0 %	10.0 %
Presentation Min	24	24	24
Safety Stock (weeks)	1	1	1
Receipt Lead Time	0	0	0
Flow Receipts	☑	☑	☑
Wp Receipt Start Week	8/13/2011	8/13/2011	8/13/2011
.			
Wp EOP Inv U	0	0	0
Wp EOP Inv R	0	0	0
Wp EOP Inv C	0	0	0
Wp Cum Avg Inv U	1,688	1,688	1,688
Wp Cum Avg Inv R	73,549	73,549	73,549
Wp Cum Avg Inv C	31,929	31,929	31,929
Wp Cum Turn U	5.3	5.3	5.3
Wp Cum Turn R	5.0	5.0	5.0
Wp Cum Turn C	5.6	5.6	5.6

To create a receipt and inventory plan, perform the following steps:

1. Change the measure profile to Receipt Parameters.
2. In the Receipt Lead Time measure, enter the number of weeks before the start sell week that you want to schedule receipts.
3. In the Receipt Frequency measure, enter the number of weeks between each receipt. For example, 1 means that receipts arrive every week. 2 means that receipts arrive every other week.
4. In the Initial Receipt % measure, enter the percentage of total receipts to be included the first receipt drop.
5. In the Presentation Min measure, enter the minimum amount of inventory on the sales floor per store. This is used only in the initial receipt and can be thought of as a fixture fill.
6. In the Safety Stock (Weeks) measure, enter the number of weeks of sales in the future that each receipt drop can fulfill. This safety stock setting applies to all receipt drops except the initial receipt drop. It is based on a future week of sales, not an average week of sales.
7. In the Sell Thru Reg % measure, enter the target percentage of sales to be reached during the regular and promotional periods. This number is used as a guideline

for calculating receipts. For instance, if set to 85%, this means that 85% of the style/color is sold during the regular and promotional periods, and 15% is left to be sold during the clearance period.

8. Select the **Flow Receipts** check box.
9. Click the **Calculate Receipt Flow** button in the upper right corner.

Figure 6–23 Planning Actions: Calculate Receipt Flow

The Wp Receipts U and Receipt Start Week measures are populated. After you have calculated the receipt flow, continue to the Item Plan View: Receipts and Inventory Measure Profile to view the receipt and inventory plan.

Table 6–8 Item Plan Parameters View - Receipt Parameters Measure Profile

Measure	Description
# Stores	The number of stores that sell the style/color.
Start Sell Week	The first week that the style/color is sold.
Wp Sls Reg + Pro U	The combined total of the planned regular and promotional units. This is a calculated measure.
Sell Thru Reg %	The target percentage of sales to be reached during the regular and promotional periods.
Wp BOS U	The planned beginning of season units.
Wp BOS R	The planned beginning of season retail.
Wp BOS C	The planned beginning of season cost.
Receipt Frequency	The number of weeks between each receipt drop.
Initial Receipt %	The percentage of total receipts to be included in the first receipt drop.
Presentation Min	The minimum amount of inventory on the sales floor per store. This is used only in the initial receipt and can be thought of as a fixture fill.
Safety Stock (weeks)	The number of weeks of sales in the future that each receipt drop can fulfill. This applies to all receipt drops except the initial one. It is based on a future week of sales, not an average week of sales.
Receipt Lead Time	The number of weeks before the start sell week that the initial receipt drop arrives.
Flow Receipts	Check this measure to calculate the receipt flow based on the parameters in this view.
Wp Receipt Start Week	The week that initial receipt drop occurs.
Wp EOP U	The planned end of period units. This is a calculated measure.
Wp EOP R	The planned end of period retail. This is a calculated measure.
Wp EOP C	The planned end of period cost. This is a calculated measure.
Wp Cum Avg Inv U	The planned cumulative average inventory units. This is a calculated measure.

Table 6–8 (Cont.) Item Plan Parameters View - Receipt Parameters Measure Profile

Measure	Description
Wp Cum Avg Inv R	The planned cumulative average inventory retail. This is a calculated measure.
Wp Cum Avg Inv C	The planned cumulative average inventory cost. This is a calculated measure.
Wp Cum Turn U	The planned cumulative turn units. This is a calculated measure.
Wp Cum Turn R	The planned cumulative turn retail. This is a calculated measure.
Wp Cum Turn C	The planned cumulative turn cost. This is a calculated measure.

Manage Item Plans and Promotional Lifts Task: Receipt and Inventory Plan

After you have developed the receipt flow, review the receipt and inventory plan in the Item Plan view.

Item Plan View: Receipts and Inventory Measure Profile

Use this view to review the receipt and inventory plan you created in the Item Plan Parameters view.

1. Change the measure profile of the Item Plan view to **Receipts and Inventory**.
2. Review the receipt units in the Wp Receipt U measure.

Figure 6–24 Item Plan View: Receipts and Inventory Measure Profile

Item Plan

Location | Product

Brick & Mortar ▪ ACME LEATHER JACKET/BLACK ▪

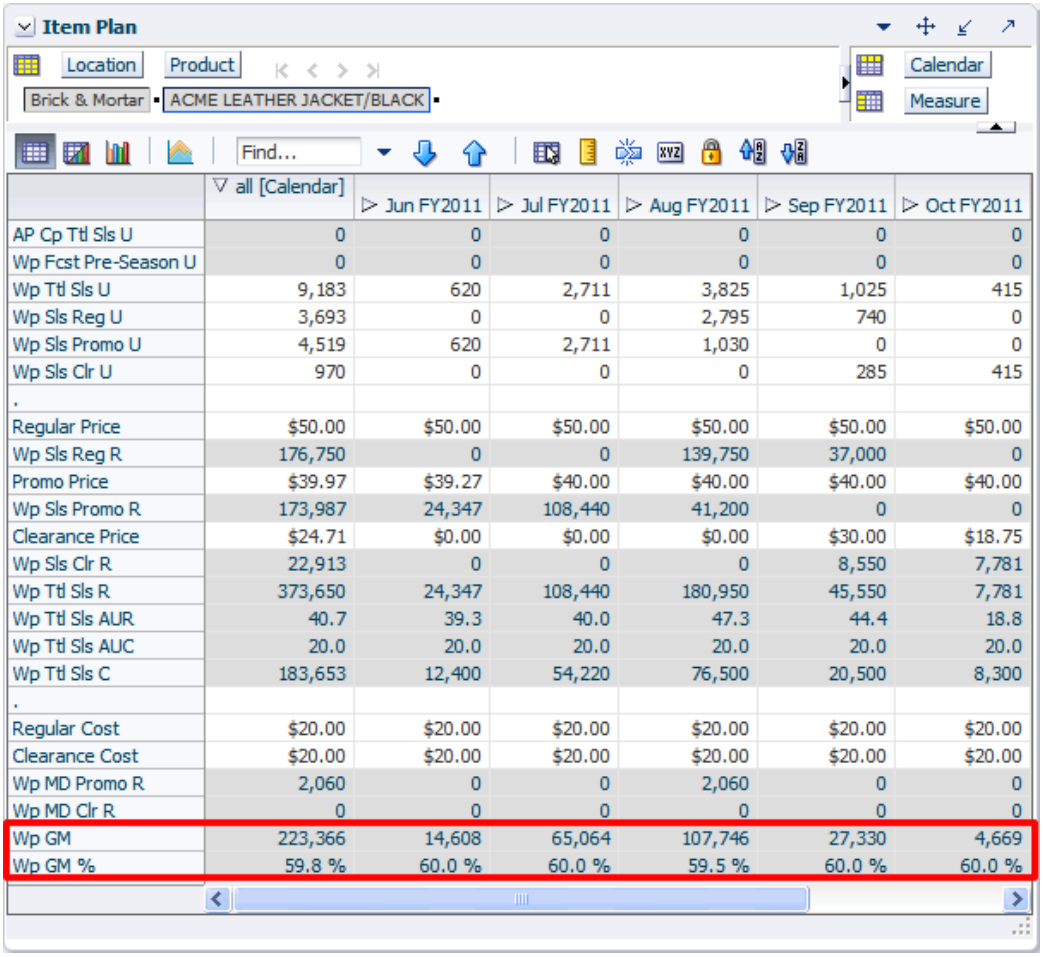
Calendar | Measure

Find...

	all [Calendar]	Jun FY2011	Jul FY2011	Aug FY2011	Sep FY2011	Oct FY2011
Start Sell Week	8/27/2011					
Ap Cp Receipts Units	0	0	0	0	0	0
Wp BOS U	100					
Wp Ttl Sls U	8,866	620	2,711	3,825	1,025	415
Wp Receipts U	9,454	3,277	3,713	2,193	271	0
Wp Misc In U	0	0	0	0	0	0
Wp Misc Out U	0	0	0	0	0	0
Wp Shrink U	177	12	54	76	20	8
Wp EOP Inv U	0	2,745	3,692	1,984	1,209	786
Wp Cum Avg Inv U	1,688	1,843	2,373	2,430	2,219	1,985
Wp Cum Turn U	5.3	0.3	1.4	2.9	3.7	4.3
.						
Wp BOS R	50					
Wp Ttl Sls R	368,726	23,606	108,440	180,950	45,550	8,040
Wp Misc In R	0	0	0	0	0	0
Wp Misc Out R	0	0	0	0	0	0
Wp Shrink R	7,375	472	2,169	3,619	911	161
Wp MkUp R	0	0	0	0	0	0
Wp EOP Inv R	0	135,011	182,942	97,723	34,811	10,321
Wp Cum Avg Inv R	73,549	88,545	115,792	119,155	105,967	89,711
Wp Cum Turn R	5.0	0.3	1.1	2.6	3.4	4.1
.						
Wp BOS C	20					
Regular Cost	$20.00	$20.00	$20.00	$20.00	$20.00	$20.00
Clearance Cost	$20.00	$20.00	$20.00	$20.00	$20.00	$20.00
Wp Misc In C	0	0	0	0	0	0
Wp Misc Out C	0	0	0	0	0	0
Wp Shrink C	3,546	248	1,084	1,530	410	166
Wp Receipts C	189,080	65,540	74,260	43,860	5,420	0
Wp EOP Inv C	0	52,912	71,868	37,698	22,208	13,742

3. Return to the **Sales and Margin Plan** measure profile.
4. Review the gross margin in the Sales and Margin Plan measure profile. The margin measures are populated now that the receipt markup has been planned.

Figure 6–25 Item Plan View: Sales and Margin Plan Measure Profile



	all [Calendar]	Jun FY2011	Jul FY2011	Aug FY2011	Sep FY2011	Oct FY2011
AP Cp Ttl Sls U	0	0	0	0	0	0
Wp Fcst Pre-Season U	0	0	0	0	0	0
Wp Ttl Sls U	9,183	620	2,711	3,825	1,025	415
Wp Sls Reg U	3,693	0	0	2,795	740	0
Wp Sls Promo U	4,519	620	2,711	1,030	0	0
Wp Sls Clr U	970	0	0	0	285	415
.						
Regular Price	$50.00	$50.00	$50.00	$50.00	$50.00	$50.00
Wp Sls Reg R	176,750	0	0	139,750	37,000	0
Promo Price	$39.97	$39.27	$40.00	$40.00	$40.00	$40.00
Wp Sls Promo R	173,987	24,347	108,440	41,200	0	0
Clearance Price	$24.71	$0.00	$0.00	$0.00	$30.00	$18.75
Wp Sls Clr R	22,913	0	0	0	8,550	7,781
Wp Ttl Sls R	373,650	24,347	108,440	180,950	45,550	7,781
Wp Ttl Sls AUR	40.7	39.3	40.0	47.3	44.4	18.8
Wp Ttl Sls AUC	20.0	20.0	20.0	20.0	20.0	20.0
Wp Ttl Sls C	183,653	12,400	54,220	76,500	20,500	8,300
.						
Regular Cost	$20.00	$20.00	$20.00	$20.00	$20.00	$20.00
Clearance Cost	$20.00	$20.00	$20.00	$20.00	$20.00	$20.00
Wp MD Promo R	2,060	0	0	2,060	0	0
Wp MD Clr R	0	0	0	0	0	0
Wp GM	223,366	14,608	65,064	107,746	27,330	4,669
Wp GM %	59.8 %	60.0 %	60.0 %	59.5 %	60.0 %	60.0 %

If you are satisfied with the receipts and inventory plan, continue to the Review and Approve Item Plans Step. If not, return to the Item Plan Parameters View: Receipt Parameters Measure Profile to adjust the plan.

Review and Approve Item Plans Step

After you have developed the sales and margin plan and receipts and inventory plan, compare them to the plans created in the Merchandise Financial Planning (MFP) application. Once you have reviewed the plans, approve them in the Plan Approval view.

This step contains three views: Item Plan View, All Measures View, and Review and Approve Item Plans View.

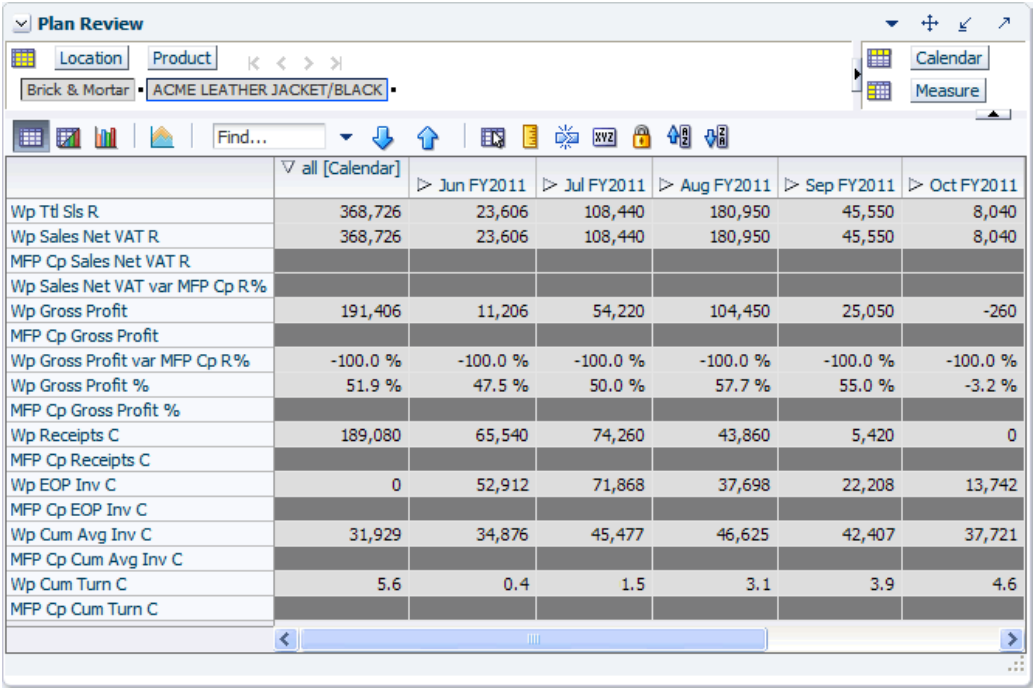
Plan Review View

Use this view to compare the plan to the plans created in MFP. Several measure profiles are available for comparison:

- Compare to MFP Cost Cp Plan
- Compare to MFP Cost Op Plan
- Compare to MFP Retail Cp Plan

- Compare to MFP Retail Op Plan
- Compare to MFP Unit Plan

Figure 6–26 Plan Review Step: Compare to MFP Cost Cp Plan



	all [Calendar]	Jun FY2011	Jul FY2011	Aug FY2011	Sep FY2011	Oct FY2011
Wp Ttl Sls R	368,726	23,606	108,440	180,950	45,550	8,040
Wp Sales Net VAT R	368,726	23,606	108,440	180,950	45,550	8,040
MFP Cp Sales Net VAT R						
Wp Sales Net VAT var MFP Cp R%						
Wp Gross Profit	191,406	11,206	54,220	104,450	25,050	-260
MFP Cp Gross Profit						
Wp Gross Profit var MFP Cp R%	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Wp Gross Profit %	51.9 %	47.5 %	50.0 %	57.7 %	55.0 %	-3.2 %
MFP Cp Gross Profit %						
Wp Receipts C	189,080	65,540	74,260	43,860	5,420	0
MFP Cp Receipts C						
Wp EOP Inv C	0	52,912	71,868	37,698	22,208	13,742
MFP Cp EOP Inv C						
Wp Cum Avg Inv C	31,929	34,876	45,477	46,625	42,407	37,721
MFP Cp Cum Avg Inv C						
Wp Cum Turn C	5.6	0.4	1.5	3.1	3.9	4.6
MFP Cp Cum Turn C						

Review and Approve Item Plans View

After you have reviewed the plans, approve them in this view.

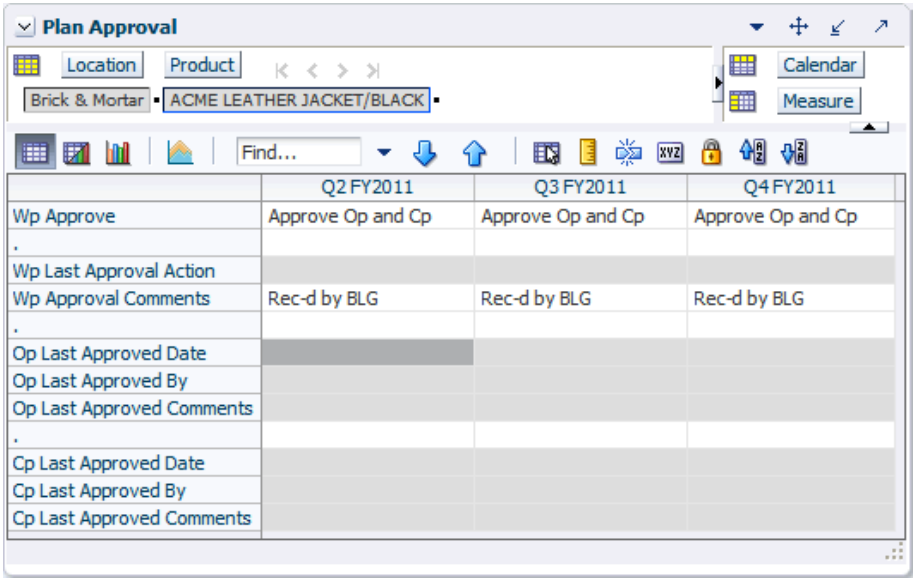
The approval process is self-approved and executed by the item planner. The versions to be updated are determined during the approval process. During preseason, it is recommended that Op and Cp are updated together to ensure synchronization. When in-season planning begins, only the Cp version is updated. If for some reason the Op needs to be updated after in-season planning has begun, you have the option to approve to the Op version only. Note that in this case, only unelapsed time periods are approved from Wp to Op.

By default, all quarters are disabled for Op approval. If the administrator allows users to approve to Op, you can approve the Op.

To approve the plans, perform the following steps:

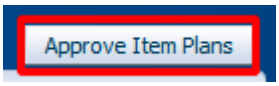
1. Use the Wp Approve measure to approve the plan. You can approve just the current plan, just the original plan, or both plans.
2. Optional: Enter comments in the Wp Approval Comments measure.

Figure 6–27 Plan Approval View



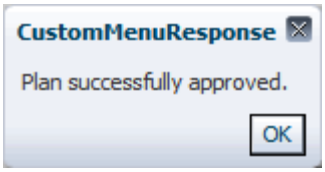
3. When ready to approve, click **Approve Item Plans** in the upper right corner Figure 6–28.

Figure 6–28 Approve Item Plans Button



4. A success message appears, informing you that the plan was successfully approved. Click **OK** to close it.

Figure 6–29 Plan Approved Message



The view refreshes and the Wp Approve and Wp Approval Comments measures are cleared. The Wp Last Approval Action measure along with the associated Op and Cp measures are populated (Figure 6–30).

Figure 6–30 Approved Plans

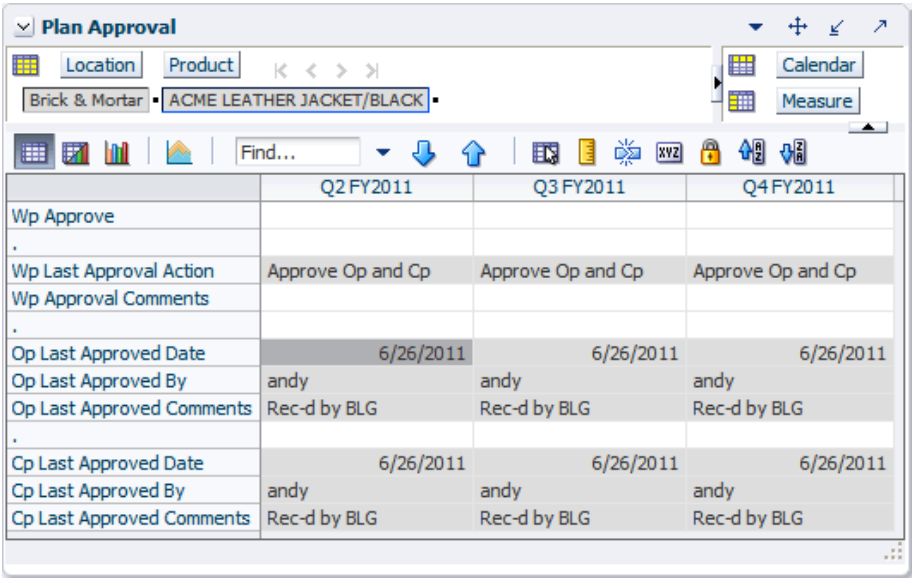


Table 6–9 lists the measures available on this view.

Table 6–9 Approval Step Measures

Measure	Description
Wp Approve	Use this measure to approve the plan to the current plan, original plan, or both.
Wp Last Approval Action	Displays the last type of approval for the time period. The choices are Approve Op and Cp, Approve Op Only, and Approve Cp Only.
Wp Approval Comments	Use this measure to enter comments about the plan.
Op Last Approved Date	The date that the last original plan was approved.
Op Last Approved By	The username of the person who last approved the original plan.
Op Last Approved Comments	The comments about the original plan approval made by the user.
Cp Last Approved Date	The date that the last current plan was approved.
Cp Last Approved By	The username of the person who last approved the current plan.
Cp Last Approved Comments	The comments about the current plan approval made by the user.

Committing Targets

When you are ready to share your plan with other users, you should commit your workbook to the domain. This shares your plan with others. For more information about committing, see the *Oracle Retail Predictive Application Server User Guide for the Fusion Client*.

To commit your plan, perform the following steps:

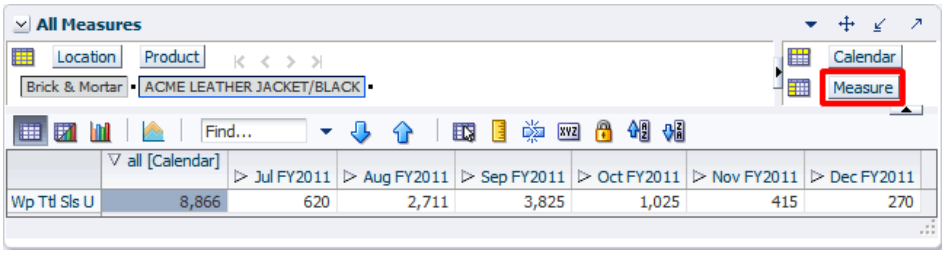
1. Approve your plans using the instructions in Review and Approve Item Plans View section.
2. In the workbook that you have published the targets, click **Commit** in the toolbar. Or, from the File menu, select the **Commit** option.

Once the commit has occurred, the commit status changes to committed.

All Measures View

The All Measures view contains all the measures in the workbook; however, only the Wp Ttl Sls U measure is visible in the default measure profile. The purpose of this view allows you to create a view of workbook measures that you may not be able to view all at once in other views.

Figure 6–31 All Measures View



To see the other measures in this view, perform the following steps:

1. Click the **Measure** dimension tile. The All Measures - Measure window appears.
2. Click the **Show/Hide** tab.
3. Move measures you want to see in the view from the Hidden Measures box to the Visible Measures box.
4. When finished, click **OK**.

For more information about hidden and visible measures, see the *Oracle Retail Predictive Application Server User Guide for the Fusion Client*.

7

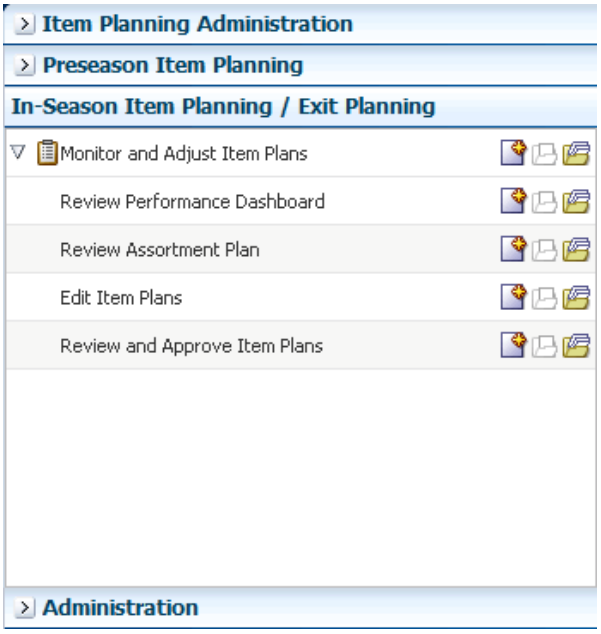
Monitor and Adjust Item Plans

Use the Monitor and Adjust Item Plans task to adjust the item plan after the season has started. This task has four steps:

- Review Performance Dashboard Step
- Review Assortment Plan Step
- Edit Item Plans Step
- Review and Approve Item Plans Step

This task and steps are shown in Figure 7–1.

Figure 7–1 Monitor and Adjust Item Plans Task

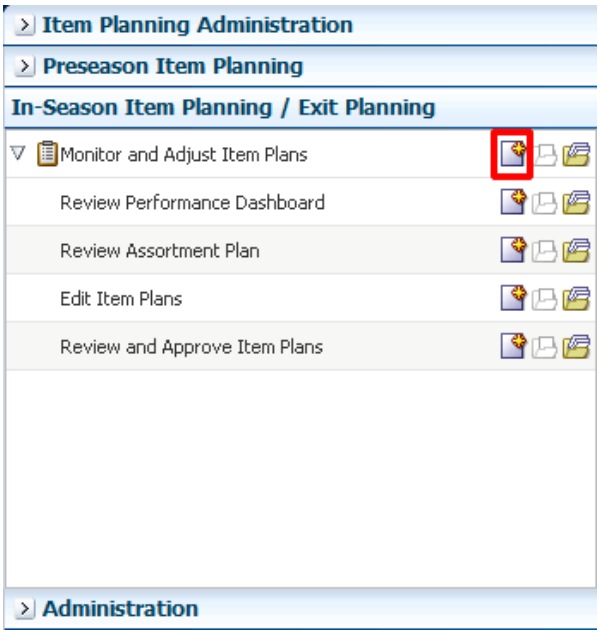


Building the Monitor and Adjust Item Plans Workbook

To build the Monitor and Adjust Item Plans workbook, perform the following steps:

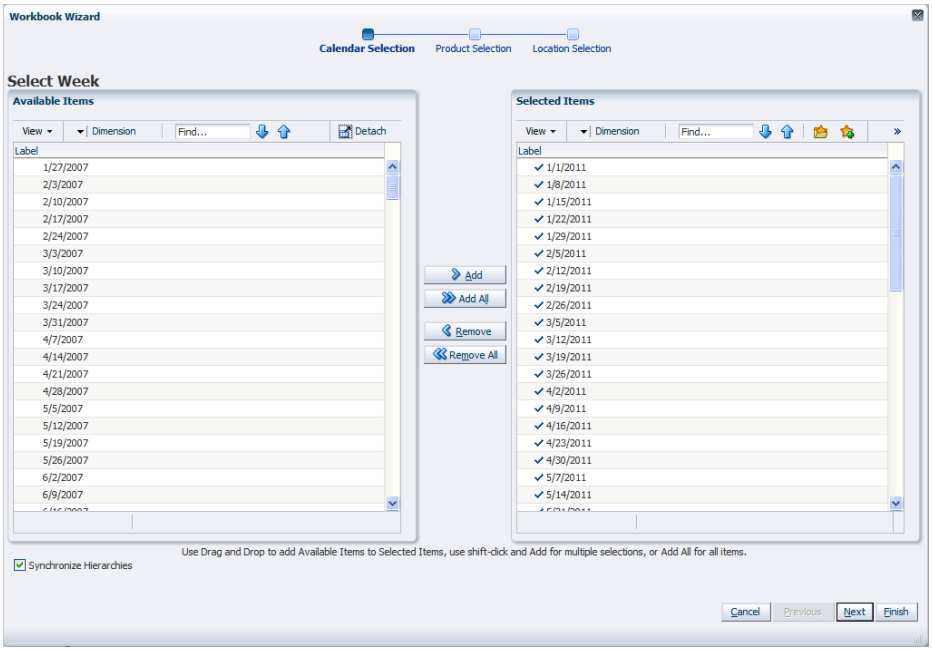
1. Click the **Create New Workbook** icon in the Monitor and Adjust Item Plans task.

Figure 7–2 New Workbook Dialog Box



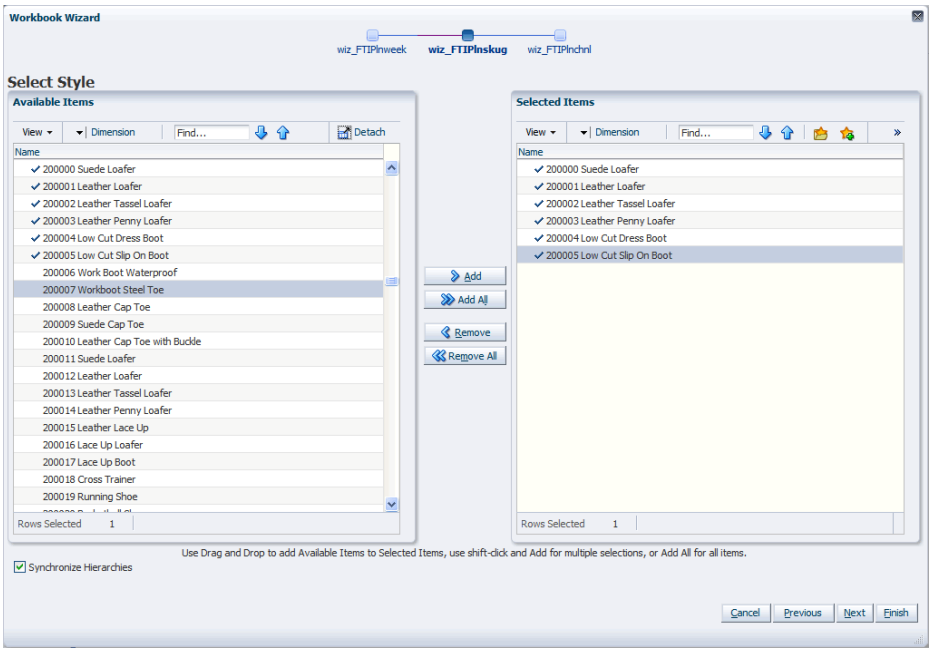
2. The workbook wizard opens at the Calendar Selection step. Select the weeks that you want to plan. Click **Next**.

Figure 7–3 Workbook Wizard: Calendar Selection



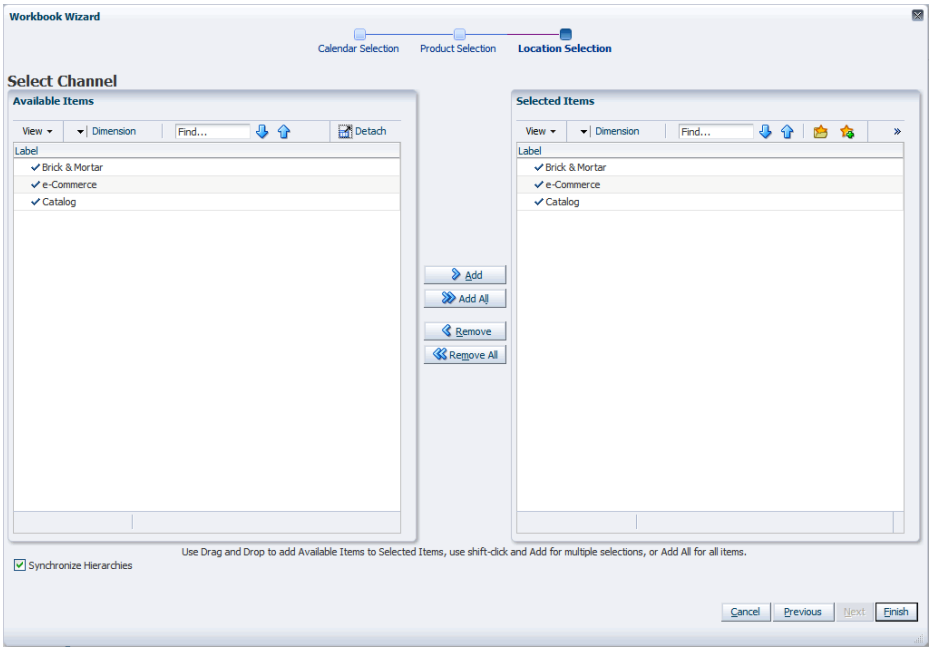
3. The Product Selection step of the workbook wizard appears. Select the styles you want to plan. Click **Next**.

Figure 7–4 Workbook Wizard: Product Selection



4. The Location Selection workbook of the workbook wizard appears. Select the channels you want to plan. Click **Finish**.

Figure 7–5 Workbook Wizard: Location Selection



The Monitor and Adjust Item Plans workbook is built, and the Dashboard View opens.

Review Performance Dashboard Step

Use the views in this step to review the lifecycle of the style/color as it was setup in the Develop and Approve Item Plans task. This step has two views:

- Dashboard View
- Bounds View

Dashboard View

Use the dashboard view for a quick overview of each style/color's data.

The exception measures in this view highlight data that falls within or outside of the bounds set in the next view.

Figure 7–6 Dashboard View

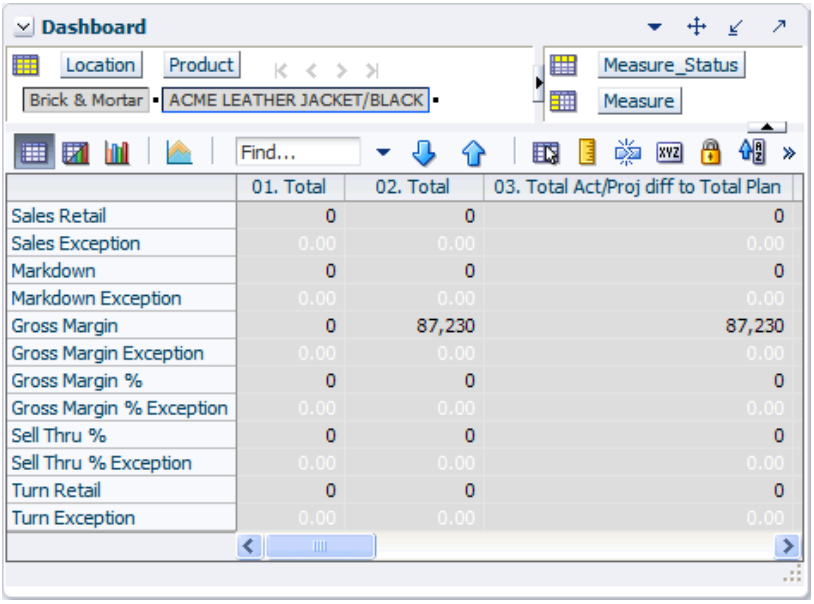


Table 7–1 lists the measures available on this view.

Table 7–1 Dashboard View Measures

Measure	Description
Sales Retail	The Retail value of Sales.
Sales Exception	The Sales exception that is highlighted per the user-defined upper and lower bound limits.
Markdown	Total Markdowns Retail .
Markdown Exception	The Markdown exception that is highlighted per the user-defined upper and lower bound limits.
Gross Profit	Gross Profit Retail.
Gross Profit Exception	The Gross profit result that is highlighted per the user-defined upper and lower bound limits.
Gross Profit %	Gross Profit Rate.
Gross Profit Exception	The Gross profit % result that is highlighted per the user-defined upper and lower bound limits.

Table 7–1 (Cont.) Dashboard View Measures

Measure	Description
Sell Thru %	The rate at which sales units are moved through beginning of period inventory.
Sell Thru % Exception	The Sell through % exception that is highlighted per the user-defined upper and lower bound limits.
Turn Retail	Cumulative Turnover representing the frequency which Inventory is sold and replaced over a stated time period.
Turn Exception	The turn exception that is highlighted per the user-defined upper and lower bound limits.

Bounds View

This view allows you to set the upper and lower bounds for sales, markdown, gross profit, sell through, and turn.

Figure 7–7 Bounds View

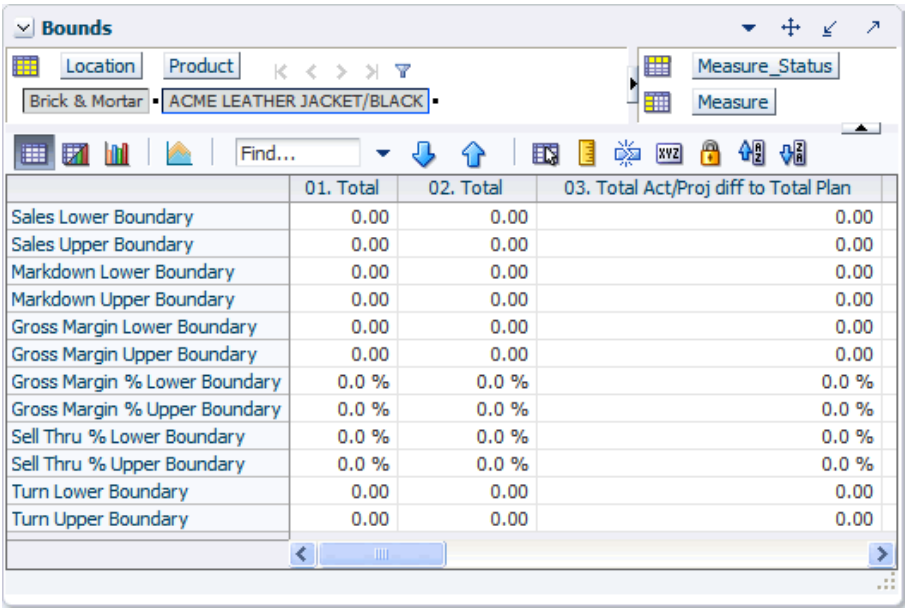


Table 7–2 lists the measures available on this view.

Table 7–2 Bounds View Measures

Measure	Description
Sales Lower Bound	User-defined sales lower limit. If the sales of any style/color is below this threshold, it is highlighted in the Dashboard view as an exception.
Sales Upper Bound	User-defined sales upper limit. If the sales of any style/color is above this threshold, it is highlighted in the Dashboard view as an exception.
Markdown Lower Bound	User-defined markdown lower limit. If the markdown of any style/color is below this threshold, it is highlighted in the Dashboard view as an exception.

Table 7–2 (Cont.) Bounds View Measures

Measure	Description
Markdown Upper Bound	User-defined markdown upper limit. If the markdown of any style/color is above this threshold, it is highlighted in the Dashboard view as an exception.
Gross Profit Lower Bound	User-defined gross profit lower limit. If the gross profit of any style/color is below this threshold, it is highlighted in the Dashboard view as an exception.
Gross Profit Upper Bound	User-defined gross profit upper limit. If the gross profit of any style/color is above this threshold, it is highlighted in the Dashboard view as an exception.
Gross Profit % Lower Bound	User-defined gross profit percentage lower limit. If the gross profit percentage of any style/color is below this threshold, it is highlighted in the Dashboard view as an exception.
Gross Profit % Upper Bound	User-defined gross profit percentage upper limit. If the gross profit percentage of any style/color is above this threshold, it is highlighted in the Dashboard view as an exception.
Sell Thru % Lower Bound	User-defined sell through percentage percentage lower limit. If the sell through percentage of any style/color is below this threshold, it is highlighted in the Dashboard view as an exception.
Sell Thru % Upper Bound	User-defined sell through percentage upper limit. If the sell through percentage of any style/color is above this threshold, it is highlighted in the Dashboard view as an exception.
Turn Lower Bound	User-defined turn percentage lower limit. If the turn of any style/color is below this threshold, it is highlighted in the Dashboard view as an exception.
Turn Upper Bound	User-defined turn percentage upper limit. If the turn of any style/color is above this threshold, it is highlighted in the Dashboard view as an exception.

After you have reviewed the dashboard, continue to the Review Assortment Plan Step.

Review Assortment Plan Step

The Review Assortment Plan step has two views:

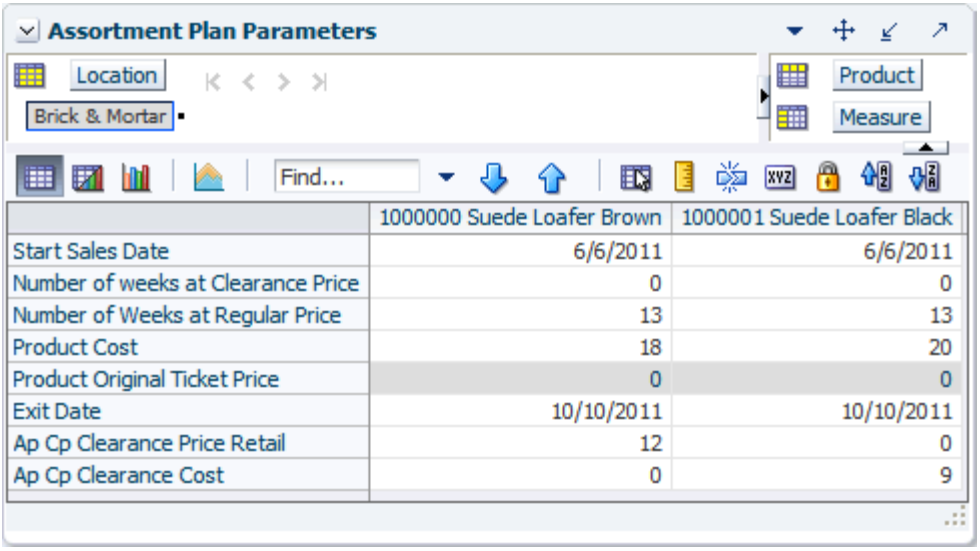
- Assortment Plan Parameters View
- Assortment Plan Details View

If you do not use Assortment Planning, continue to the Edit Item Plans Step.

Assortment Plan Parameters View

Review the views in the Assortment Plan step if you have loaded data from the Assortment Planning application.

Figure 7–8 Assortment Plan Parameters View



	1000000 Suede Loafer Brown	1000001 Suede Loafer Black
Start Sales Date	6/6/2011	6/6/2011
Number of weeks at Clearance Price	0	0
Number of Weeks at Regular Price	13	13
Product Cost	18	20
Product Original Ticket Price	0	0
Exit Date	10/10/2011	10/10/2011
Ap Cp Clearance Price Retail	12	0
Ap Cp Clearance Cost	0	9

Table 7–3 lists the measures available on this view.

Table 7–3 Assortment Plan Parameters View Measures

Measure	Description
Product Original Ticket Price	Initial retail of product.
Product Cost	The cost of the product.
Start Sales Date	The date the product is expected to start selling.
Number of weeks at Clearance Price	Number of weeks the item is expected to sell at Clearance Price.
Number of Weeks at Regular Price	Number of weeks the item is expected to sell at Regular Price.
Exit Date	The date that the product should be removed from the sales floor.

Assortment Plan Details View

Use the Assortment Plan Details view to see the plan that was created in the Assortment Planning application for the same style-colors you are planning.

Figure 7–9 Assortment Plan Details View

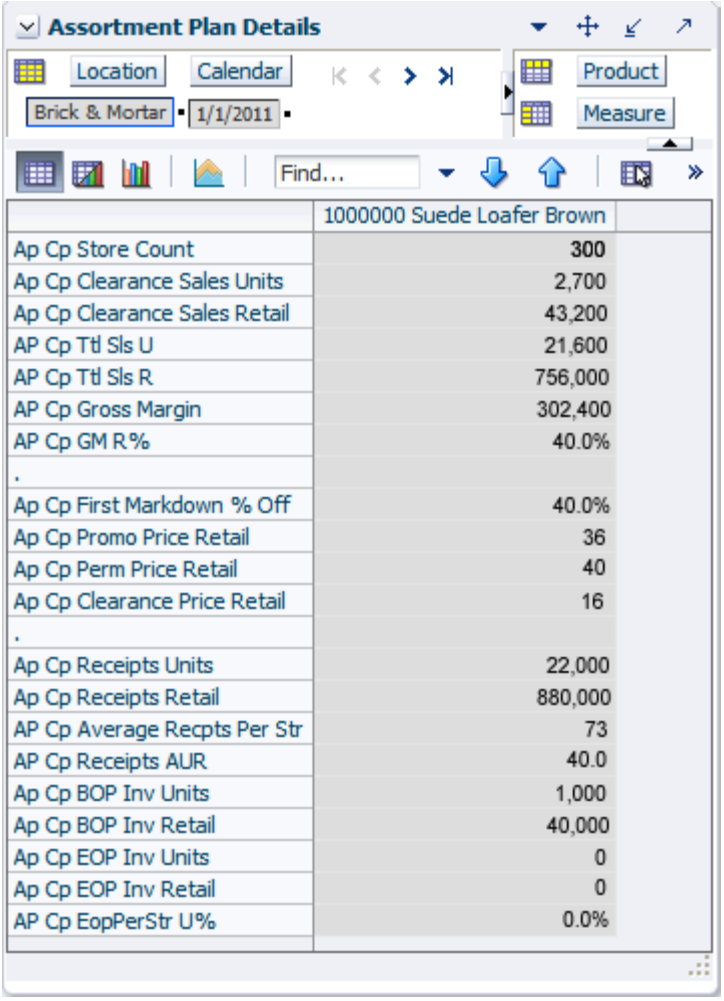


Table 7–4 lists the measures available on this view.

Table 7–4 Assortment Plan Details View Measures

Measure	Description
Ap Cp Store Count	The number of stores for which this style/color is planned for in the approved plan from the Assortment Planning application.
Ap Cp Clearance Sales Units	Assortment Planning Current Plan Clearance Sales units.
Ap Cp Clearance Sales Retail	Assortment Planning Current Plan Clearance Sales retail.
Ap Cp Ttl Sls U	Assortment Planning Current Plan Total Sales Units.
Ap Cp Ttl Sls R	Assortment Planning Current Plan Total Sales Retail.
AP Cp Gross Margin	Assortment Planning Current Plan Gross Margin.
Ap Cp GM R%	Assortment Planning Current Plan Gross Margin rate.
Ap Cp First Markdown % Off	Initial Markdown Taken expressed as a rate.

Table 7–4 (Cont.) Assortment Plan Details View Measures

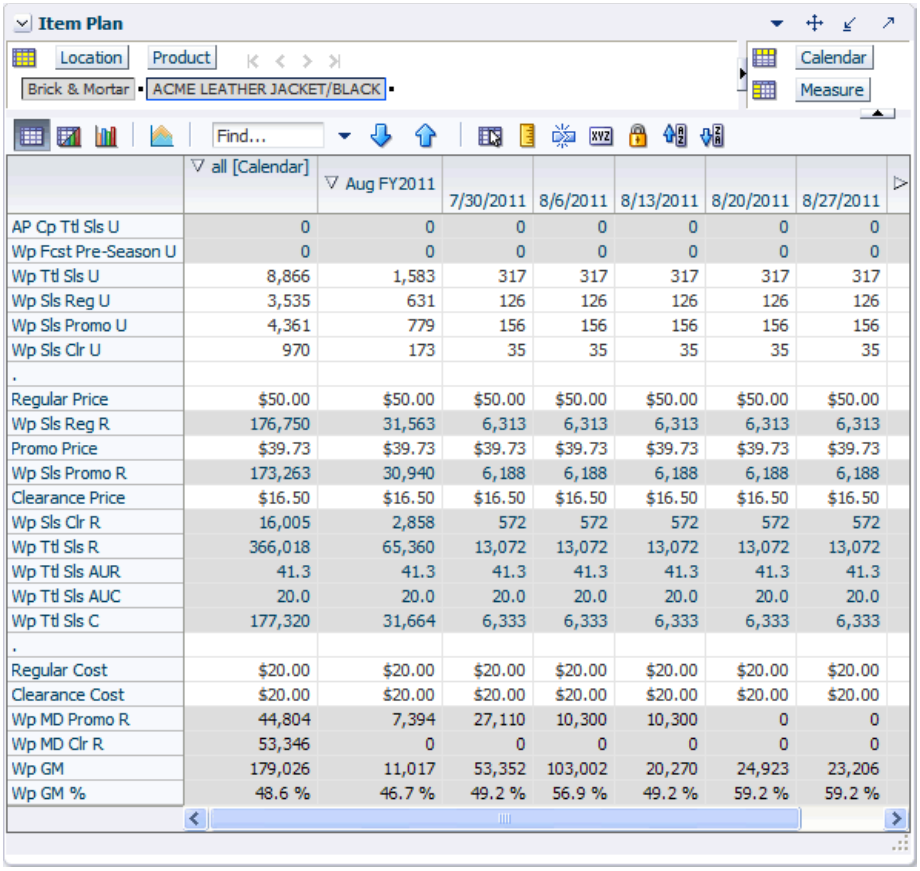
Measure	Description
Ap Cp Promo Price Change %	Assortment Planning Current Plan Promotional Price Change %.
Ap Cp Perm Price Change %	Permanent Price Change expressed as a rate.
Ap Cp Clearance Price Retail	Assortment Planning Current Plan Clearance Price Change %.
Ap Cp Receipts Units	Receipts expressed as Units.
Ap Cp Receipts Retail	Assortment Planning Current Plan Receipts Retail.
AP Cp Average Recpts Per Str	Assortment Planning Current Plan Average Receipts per store.
AP Cp Receipts AUR	Assortment Planning Current Plan Receipts Average Unit Retail.
Ap Cp BOP Inv Units	The Beginning of Period inventory units from Assortment Planning's current plan.
Ap Cp BOP Inv Retail	The Beginning of Period inventory retail from Assortment Planning's current plan.
Ap Cp EOP Inv Retail	The End of Period inventory retail.
Ap Cp EOP Inv Units	The End of Period inventory units.
AP Cp EopPerStr U%	Assortment Planning Current Plan End of Period Per Store Unit %.

After you have reviewed the parameters from the Assortment Planning application, continue to the Edit Item Plans Step to edit your own parameters.

Edit Item Plans Step

This step has one view: Item Plan. Use this view to review and edit the item plan.

Figure 7–10 Item Plan View



Item Plan

Location | Product | Calendar | Measure

Brick & Mortar • ACME LEATHER JACKET/BLACK •

Find...

	all [Calendar]	Aug FY2011	7/30/2011	8/6/2011	8/13/2011	8/20/2011	8/27/2011
AP Cp Ttl Sls U	0	0	0	0	0	0	0
Wp Fcst Pre-Season U	0	0	0	0	0	0	0
Wp Ttl Sls U	8,866	1,583	317	317	317	317	317
Wp Sls Reg U	3,535	631	126	126	126	126	126
Wp Sls Promo U	4,361	779	156	156	156	156	156
Wp Sls Clr U	970	173	35	35	35	35	35
.							
Regular Price	$50.00	$50.00	$50.00	$50.00	$50.00	$50.00	$50.00
Wp Sls Reg R	176,750	31,563	6,313	6,313	6,313	6,313	6,313
Promo Price	$39.73	$39.73	$39.73	$39.73	$39.73	$39.73	$39.73
Wp Sls Promo R	173,263	30,940	6,188	6,188	6,188	6,188	6,188
Clearance Price	$16.50	$16.50	$16.50	$16.50	$16.50	$16.50	$16.50
Wp Sls Clr R	16,005	2,858	572	572	572	572	572
Wp Ttl Sls R	366,018	65,360	13,072	13,072	13,072	13,072	13,072
Wp Ttl Sls AUR	41.3	41.3	41.3	41.3	41.3	41.3	41.3
Wp Ttl Sls AUC	20.0	20.0	20.0	20.0	20.0	20.0	20.0
Wp Ttl Sls C	177,320	31,664	6,333	6,333	6,333	6,333	6,333
.							
Regular Cost	$20.00	$20.00	$20.00	$20.00	$20.00	$20.00	$20.00
Clearance Cost	$20.00	$20.00	$20.00	$20.00	$20.00	$20.00	$20.00
Wp MD Promo R	44,804	7,394	27,110	10,300	10,300	0	0
Wp MD Clr R	53,346	0	0	0	0	0	0
Wp GM	179,026	11,017	53,352	103,002	20,270	24,923	23,206
Wp GM %	48.6 %	46.7 %	49.2 %	56.9 %	49.2 %	59.2 %	59.2 %

After you are satisfied with the sales plan, continue to the Review and Approve Item Plans Step.

Review and Approve Item Plans Step

After you have edited the sales and margin plan and receipts and inventory plan, compare them to the plans created in the Merchandise Financial Planning (MFP) application. Once you have reviewed the plans, approve them in the Plan Approval view.

This step includes views that are similar to the Review and Approve Item Plans Step in the Develop and Approve Item Plans task. For more information, see Review and Approve Item Plans Step.

8

Approval to Original Plan

The Approval to Original Plan task is used by planning administrators only. They use the task to enable and disable the ability of users to approve a quarterly original plan (Op). If the planning administrator disables the Op approval, users cannot approve plans to Op status.

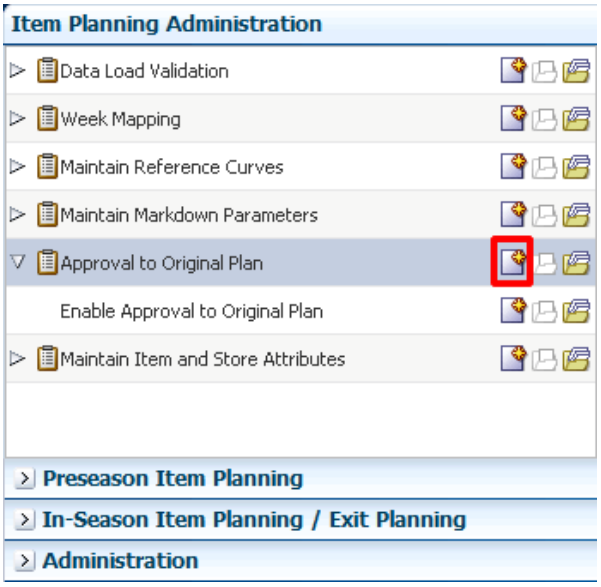
By default, the Op approval is set to enabled.

Building the Approval to Original Plan Workbook

To build a new Approval to Original Plan workbook, perform the following steps:

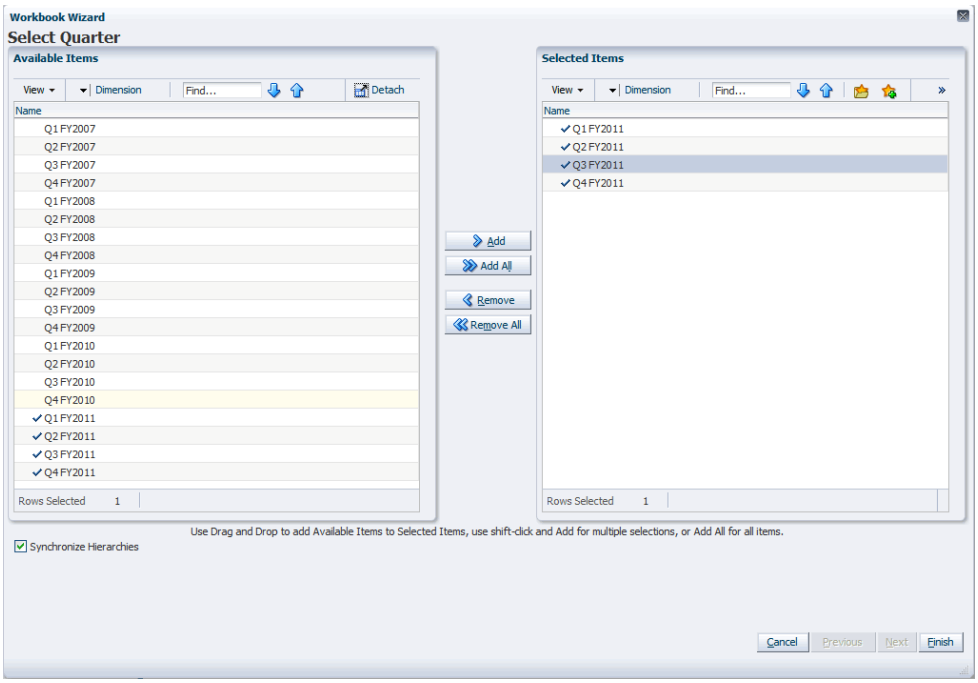
1. Click the **New Workbook** icon in the Approval to Original Plan task.

Figure 8–1 Approval to Original Plan Validation



2. The workbook wizard opens at the Calendar Selection step. Select the quarter you want to enable and click **Finish**.

Figure 8–2 Approval to Original Plan Workbook Wizard - Calendar Selection



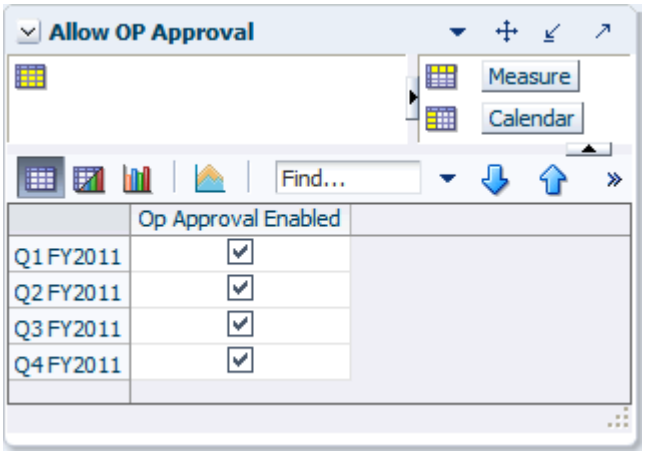
The Approval to Original Plan workbook is built and opens at the Allow Op Approval step.

Allow Op Approval

The Allow Op Approval step has one view: Allow OP Approval.

Select the quarters that you want to enable users to approve plans to the original plan.

Figure 8–3 Allow OP Approval View



The following table lists the measures available on this view.

Table 8–1 Allow Op Approval View Measures

Measure	Description
Op Approval Enabled	Select this measure to enable users to approve plans to the original plan for the quarter.

9

Data Load Validation

The Data Validation task contains all measures that are either loaded or touched during the batch calculation process. This task is used by the administrator only to verify the results of data loads and batch processes.

The Data Validation task contains the following steps:

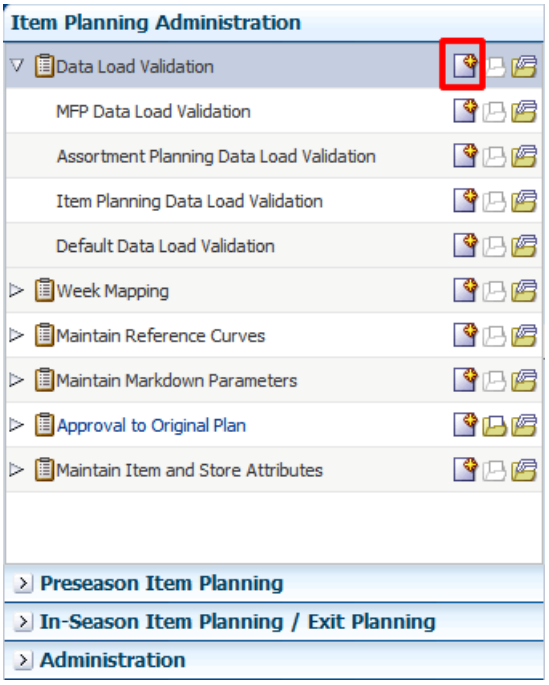
- Assortment Planning Measures View
- Default Measures View
- Item Planning Measures View
- MFP Measures View

Building the Data Validation Workbook

To build a Data Validation workbook, perform the following steps:

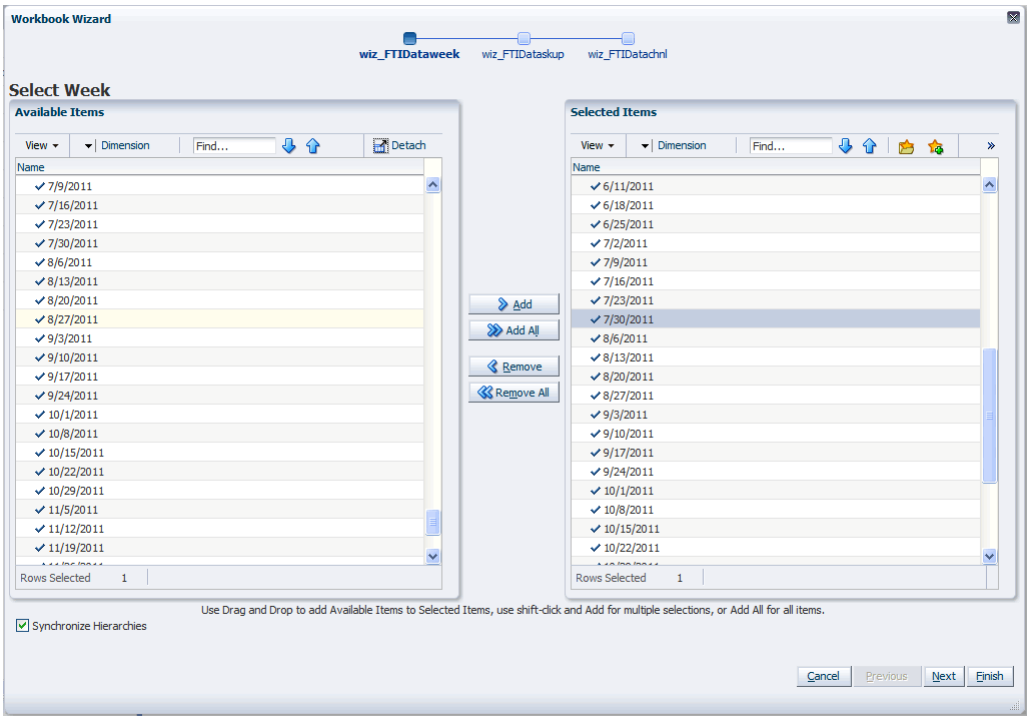
1. Click the **New Workbook** icon in the Data Validation step.

Figure 9–1 Data Load Validation



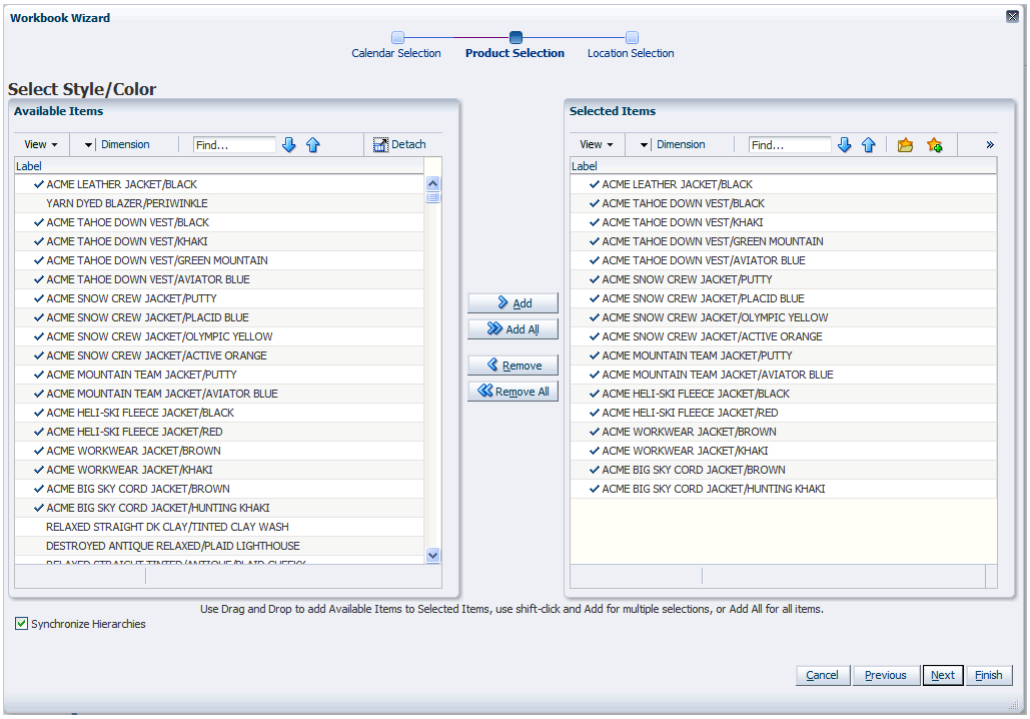
2. The workbook wizard opens at the Calendar Selection step. Select the weeks you want to validate and click **Next**.

Figure 9–2 Data Load Validation Workbook Wizard - Calendar Selection



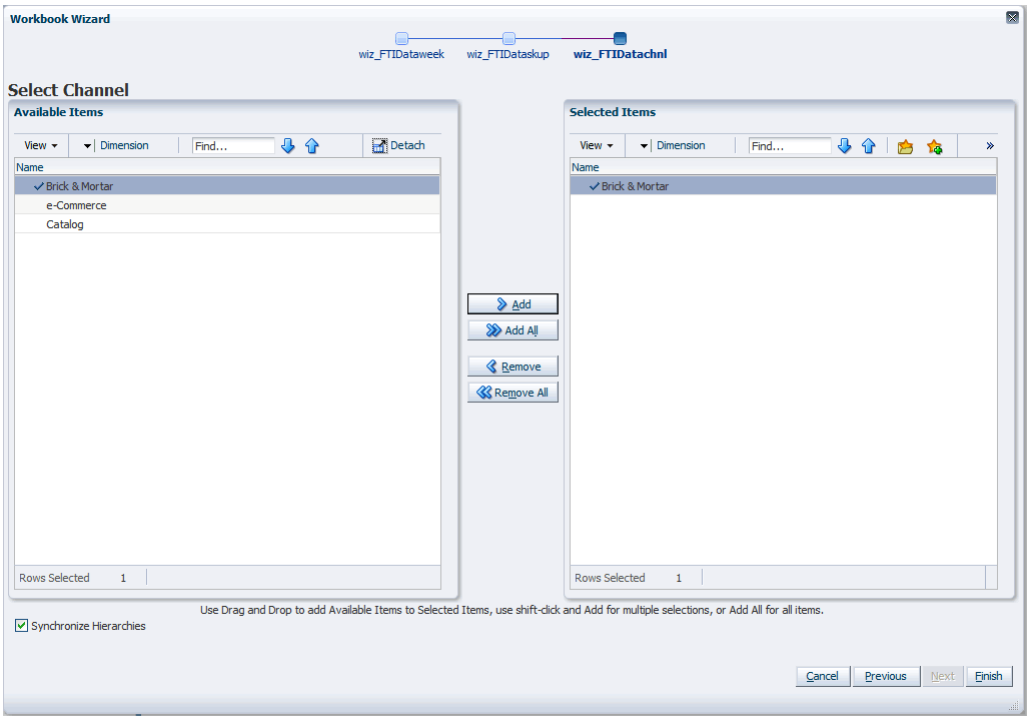
3. The Product Selection step appears. Select the style/colors and click **Next**.

Figure 9–3 Data Load Validation Workbook Wizard - Product Selection



4. The Location Selection step appears. Select the stores and click **Finish**.

Figure 9–4 Data Load Validation Workbook Wizard - Location Selection

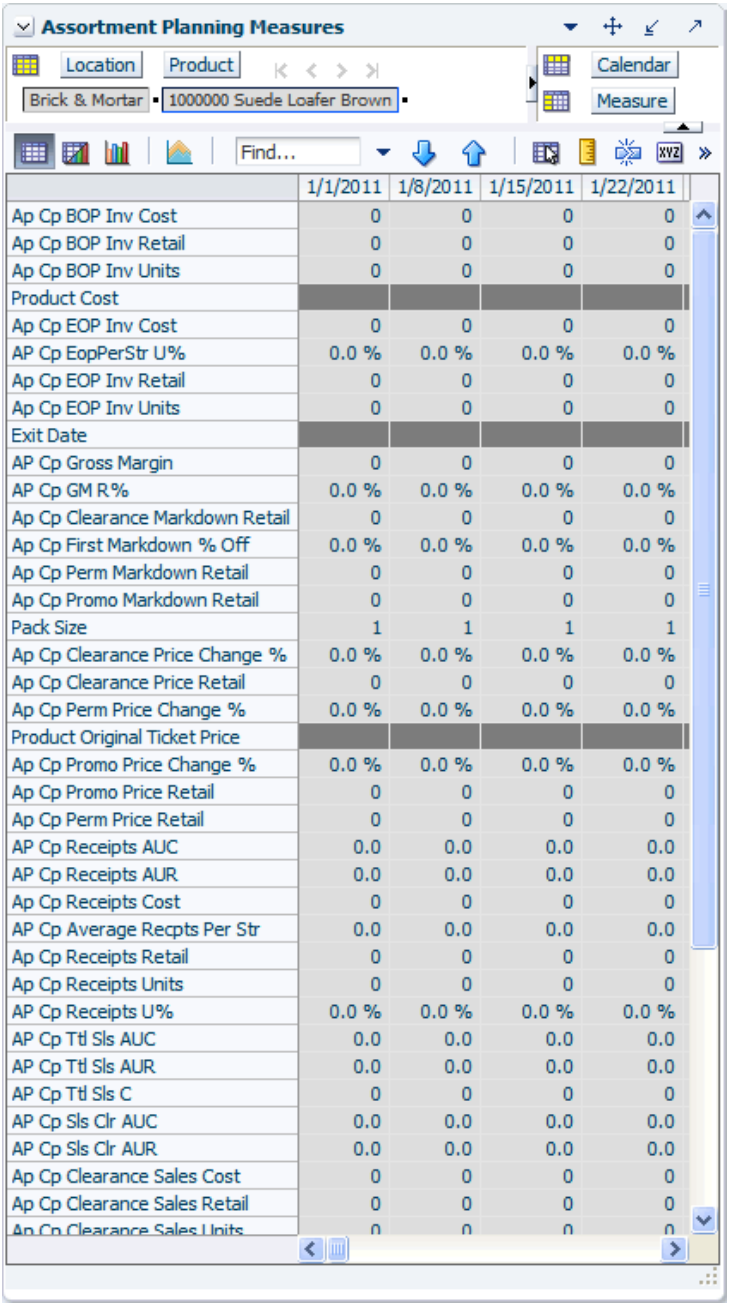


The Data Validation workbook is built.

Assortment Planning Measures View

Use the Assortment Planning Measures view to validate that the Assortment Planning data was updated in the batch process.

Figure 9–5 Assortment Planning Measures View



	1/1/2011	1/8/2011	1/15/2011	1/22/2011
Ap Cp BOP Inv Cost	0	0	0	0
Ap Cp BOP Inv Retail	0	0	0	0
Ap Cp BOP Inv Units	0	0	0	0
Product Cost				
Ap Cp EOP Inv Cost	0	0	0	0
AP Cp EopPerStr U%	0.0 %	0.0 %	0.0 %	0.0 %
Ap Cp EOP Inv Retail	0	0	0	0
Ap Cp EOP Inv Units	0	0	0	0
Exit Date				
AP Cp Gross Margin	0	0	0	0
AP Cp GM R%	0.0 %	0.0 %	0.0 %	0.0 %
Ap Cp Clearance Markdown Retail	0	0	0	0
Ap Cp First Markdown % Off	0.0 %	0.0 %	0.0 %	0.0 %
Ap Cp Perm Markdown Retail	0	0	0	0
Ap Cp Promo Markdown Retail	0	0	0	0
Pack Size	1	1	1	1
Ap Cp Clearance Price Change %	0.0 %	0.0 %	0.0 %	0.0 %
Ap Cp Clearance Price Retail	0	0	0	0
Ap Cp Perm Price Change %	0.0 %	0.0 %	0.0 %	0.0 %
Product Original Ticket Price				
Ap Cp Promo Price Change %	0.0 %	0.0 %	0.0 %	0.0 %
Ap Cp Promo Price Retail	0	0	0	0
Ap Cp Perm Price Retail	0	0	0	0
AP Cp Receipts AUC	0.0	0.0	0.0	0.0
AP Cp Receipts AUR	0.0	0.0	0.0	0.0
Ap Cp Receipts Cost	0	0	0	0
AP Cp Average Recpts Per Str	0.0	0.0	0.0	0.0
Ap Cp Receipts Retail	0	0	0	0
Ap Cp Receipts Units	0	0	0	0
AP Cp Receipts U%	0.0 %	0.0 %	0.0 %	0.0 %
AP Cp Ttl Sls AUC	0.0	0.0	0.0	0.0
AP Cp Ttl Sls AUR	0.0	0.0	0.0	0.0
AP Cp Ttl Sls C	0	0	0	0
AP Cp Sls Clr AUC	0.0	0.0	0.0	0.0
AP Cp Sls Clr AUR	0.0	0.0	0.0	0.0
Ap Cp Clearance Sales Cost	0	0	0	0
Ap Cp Clearance Sales Retail	0	0	0	0
Ap Cp Clearance Sales Units	0	0	0	0

The following table lists the measures available on this view.

Table 9–1 Assortment Planning View Measures

Measure	Description
BOP Inv Cost	Assortment Planning Current Plan Beginning of Period Inventory Cost.
BOP Inv Retail	Assortment Planning Current Plan Beginning of Period Inventory Retail.
BOP Inv Units	Assortment Planning Current Plan Beginning of Period Inventory Units.

Table 9–1 (Cont.) Assortment Planning View Measures

Measure	Description
Product Cost	The cost of the product.
EOP Inv Cost	End of Period Inventory Cost.
AP Cp EopPerStr U%	Assortment Planning Current Plan EOP Per Store Unit %.
EOP Inv Retail	End of Period Inventory Retail.
EOP Inv Units	End of Period Inventory Units.
Exit Date	Date that inventory should be removed from sales floor.
AP Cp Gross Margin	Assortment Planning Current Plan Gross Margin.
AP Cp GP R%	Assortment Planning Current Plan Gross Profit Retail %.
Clearance Markdown Retail	Assortment Planning Current Plan Clearance Markdowns - Price reduction used to clear aged or slow moving inventory at Retail.
Perm Markdown Retail	Permanent Markdowns representing a permanent retail decrease to the owned inventory price of merchandise for strategic downward re-pricing decisions at Retail.
Promo Markdown Retail	Promotional Markdowns representing the temporary reduction to the owned inventory price for promotional purposes expressed at Retail.
Pack Size	Quantity of style / color or styles purchased from Supplier as a pack.
AP Cp Price AUC	Assortment Planning Current Plan Average Unit Cost.
AP Cp Price AUR	Assortment Planning Current Plan Average Unit Retail.
AP Cp Price Clr AUC	Assortment Planning Current Plan Price Clearance Average Unit Cost.
AP Cp Price Clr AUR	Assortment Planning Current Plan Price Clearance Average Unit Retail.
Clearance Price Change %	Assortment Planning Current Plan Clearance Price Change %.
Clearance Price Retail	Assortment Planning Current Plan Clearance Price Retail.
Perm Price Change %	Permanent Price Change expressed as a rate.
Product Original Ticket Price	Initial retail of product.
Promo Price Change %	Assortment Planning Current Plan Promotional Price Change %.
Promo Price Retail	Promotional Price Average Unit Retail.
Perm Price Retail	Average Unit Retail resulting from a Permanent Price Change.
AP Cp Price Reg AUC	Assortment Planning Current Plan Price Regular Average Unit Cost.
AP Cp Price Reg AUR	Assortment Planning Current Plan Price Regular Average Unit Retail.
AP Cp Receipts AUC	Assortment Planning Current Plan Receipts Average Unit Cost.
AP Cp Receipts AUR	Assortment Planning Current Plan Receipts Average Unit Retail.
Receipts Cost	Assortment Planning Current Plan Receipts Cost.

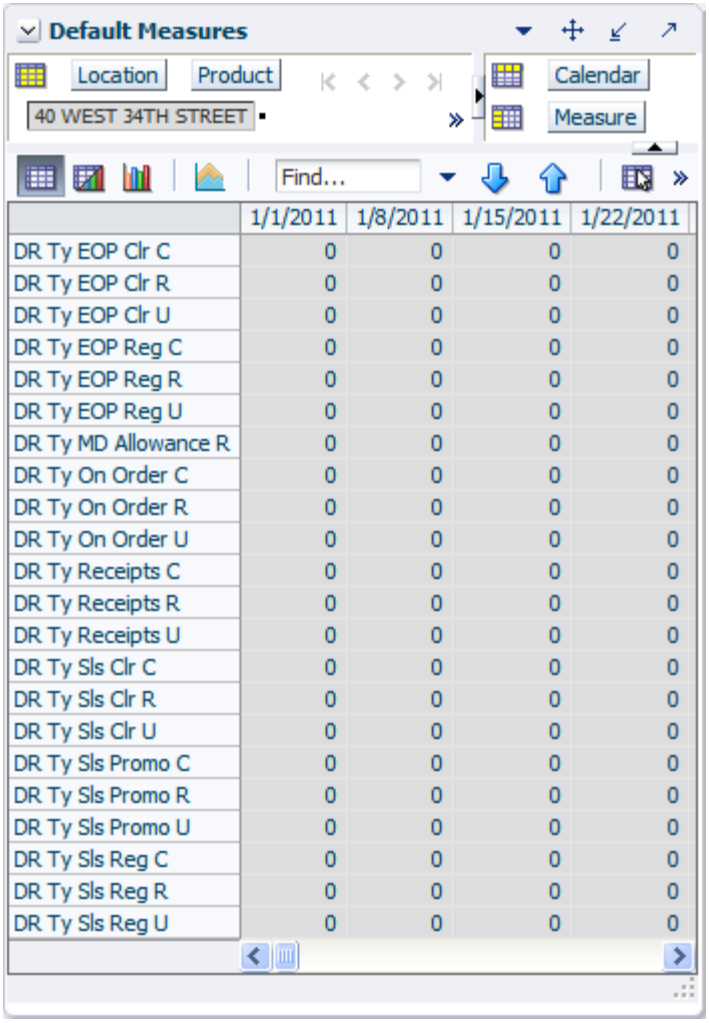
Table 9–1 (Cont.) Assortment Planning View Measures

Measure	Description
AP Cp Average Recpts Per Str	Assortment Planning Current Plan Average Receipts per store.
Receipts Retail	Assortment Planning Current Plan Receipts Retail.
Receipts Units	Receipts expressed as Units.
AP Cp Receipts U%	Assortment Planning Current Plan Receipts Units rate.
AP Cp Sls C	Assortment Planning Current Plan Sales Cost.
Clearance Sales Cost	Assortment Planning Current Plan Clearance Sales Cost.
Clearance Sales Retail	Assortment Planning Current Plan Clearance Sales Retail.
Clearance Sales Units	See Clearance Sell Thru %.
AP Cp Avg Sls Per Str U	Assortment Planning Current Plan Average Sales per store represented in units.
AP Cp Sls R	Assortment Planning Current Plan Sales Retail.
Regular Sales Cost	Assortment Planning Current Plan Regular Sales Cost.
Regular Sales Retail	Assortment Planning Current Plan Regular Sales Retail.
Regular Sales Units	Assortment Planning Current Plan Regular Sales Units.
Start Sales Date	The date the product is expected to start selling.
AP Cp Sls U	Assortment Planning Current Plan Sales Units.
Sell Thru %	Assortment Planning Current Plan Sell Thru representing the percent of total available Inventory sold in a period of time Change %.
Store Count	Count of Stores.
Number of weeks at Clearance Price	Number of weeks the item is expected to sell at Clearance Price.
Number of Weeks at Regular Price	Number of weeks the item is expected to sell at Regular Price.

Default Measures View

Use the Default Measures view to validate that the default measure data was updated in the batch process.

Figure 9–6 Default Measures View



	1/1/2011	1/8/2011	1/15/2011	1/22/2011
DR Ty EOP Clr C	0	0	0	0
DR Ty EOP Clr R	0	0	0	0
DR Ty EOP Clr U	0	0	0	0
DR Ty EOP Reg C	0	0	0	0
DR Ty EOP Reg R	0	0	0	0
DR Ty EOP Reg U	0	0	0	0
DR Ty MD Allowance R	0	0	0	0
DR Ty On Order C	0	0	0	0
DR Ty On Order R	0	0	0	0
DR Ty On Order U	0	0	0	0
DR Ty Receipts C	0	0	0	0
DR Ty Receipts R	0	0	0	0
DR Ty Receipts U	0	0	0	0
DR Ty Sls Clr C	0	0	0	0
DR Ty Sls Clr R	0	0	0	0
DR Ty Sls Clr U	0	0	0	0
DR Ty Sls Promo C	0	0	0	0
DR Ty Sls Promo R	0	0	0	0
DR Ty Sls Promo U	0	0	0	0
DR Ty Sls Reg C	0	0	0	0
DR Ty Sls Reg R	0	0	0	0
DR Ty Sls Reg U	0	0	0	0

The following table lists the measures available on this view.

Table 9–2 Default Measures View Measures

Measure	Description
DR Ty EOP Clr C	Default Role Used for Loading Measures This Year End of Period Clearance Inventory Cost.
DR Ty EOP Clr R	Default Role Used for Loading Measures This Year End of Period Clearance Inventory Retail.
DR Ty EOP Clr U	Default Role Used for Loading Measures This Year End of Period Clearance Inventory Units.
DR Ty EOP Reg C	Default Role Used for Loading Measures This Year End of Period Regular Inventory Cost.
DR Ty EOP Reg R	Default Role Used for Loading Measures This Year End of Period Regular Inventory Retail.
DR Ty EOP Reg U	Default Role Used for Loading Measures This Year End of Period Regular Inventory Units.
DR Ty On Order C	Default Role Used for Loading Measures This Year On Order Cost.

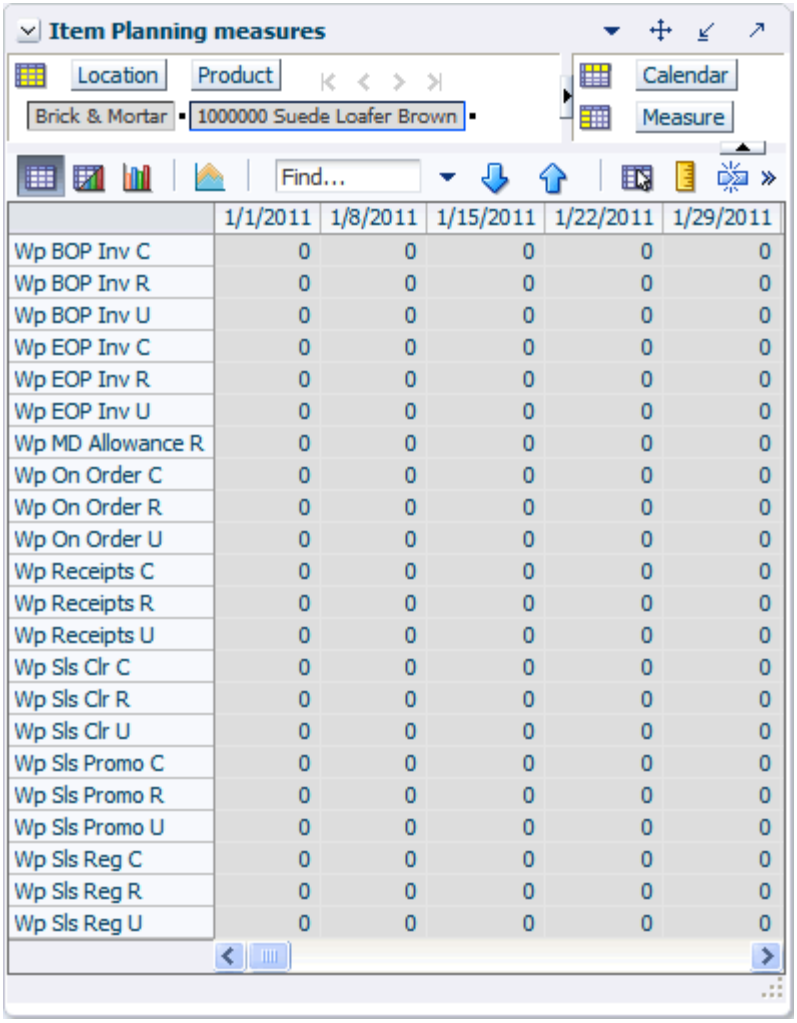
Table 9–2 (Cont.) Default Measures View Measures

Measure	Description
DR Ty MD Allowance R	Default Role Used for Loading Measures This Year Markdown Allowances Retail.
DR Ty On Order R	Default Role Used for Loading Measures This Year On Order Retail.
DR Ty On Order U	Default Role Used for Loading Measures This Year On Order Units.
DR Ty Receipts C	Default Role Used for Loading Measures This Year Receipts Cost.
DR Ty Receipts R	Default Role Used for Loading Measures This Year Receipts Retail.
DR Ty Receipts U	Default Role Used for Loading Measures This Year Receipts Units.
DR Ty Sls Clr C	Default Role Used for Loading Measures This Year Clearance Sales Cost.
DR Ty Sls Clr R	Default Role Used for Loading Measures This Year Clearance Sales Retail.
DR Ty Sls Clr U	Default Role Used for Loading Measures This Year Clearance Sales Units.
DR Ty Sls Promo C	Default Role Used for Loading Measures This Year Promotional Sales Cost.
DR Ty Sls Promo R	Default Role Used for Loading Measures This Year Promotional Sales Retail.
DR Ty Sls Promo U	Default Role Used for Loading Measures This Year Promotional Sales Units.
DR Ty Sls Reg C	Default Role Used for Loading Measures This Year Regular Sales Cost.
DR Ty Sls Reg R	Default Role Used for Loading Measures This Year Regular Sales Retail.
DR Ty Sls Reg U	Default Role Used for Loading Measures This Year Regular Sales Units.

Item Planning Measures View

Use the Item Planning Measures view to validate that the Item Planning data was updated in the batch process.

Figure 9–7 Item Planning Measures View



	1/1/2011	1/8/2011	1/15/2011	1/22/2011	1/29/2011
Wp BOP Inv C	0	0	0	0	0
Wp BOP Inv R	0	0	0	0	0
Wp BOP Inv U	0	0	0	0	0
Wp EOP Inv C	0	0	0	0	0
Wp EOP Inv R	0	0	0	0	0
Wp EOP Inv U	0	0	0	0	0
Wp MD Allowance R	0	0	0	0	0
Wp On Order C	0	0	0	0	0
Wp On Order R	0	0	0	0	0
Wp On Order U	0	0	0	0	0
Wp Receipts C	0	0	0	0	0
Wp Receipts R	0	0	0	0	0
Wp Receipts U	0	0	0	0	0
Wp Sls Clr C	0	0	0	0	0
Wp Sls Clr R	0	0	0	0	0
Wp Sls Clr U	0	0	0	0	0
Wp Sls Promo C	0	0	0	0	0
Wp Sls Promo R	0	0	0	0	0
Wp Sls Promo U	0	0	0	0	0
Wp Sls Reg C	0	0	0	0	0
Wp Sls Reg R	0	0	0	0	0
Wp Sls Reg U	0	0	0	0	0

The following table lists the measures available on this view.

Table 9–3 Item Planning Measures View Measures

Measure	Description
WP BOP Clr C	Working Plan Clearance Beginning of Period Inventory Cost.
WP BOP Clr R	Working Plan Clearance Beginning of Period Inventory Retail.
WP BOP Clr U	Working Plan Clearance Beginning of Period Inventory Units.
WP BOP Reg C	Working Plan Regular Beginning of Period Inventory Cost.
WP BOP Reg R	Working Plan Regular Beginning of Period Inventory Retail.
WP BOP Reg U	Working Plan Regular Beginning of Period Inventory Units.
Wp EOP Clr C	Working Plan End of Period Clearance Inventory Cost.
Wp EOP Clr R	Working Plan End of Period Clearance Inventory Retail.
Wp EOP Clr U	Working Plan End of Period Clearance Inventory Units.
Wp EOP Reg C	Working Plan End of Period Regular Inventory Cost.
Wp EOP Reg R	Working Plan End of Period Regular Inventory Retail.

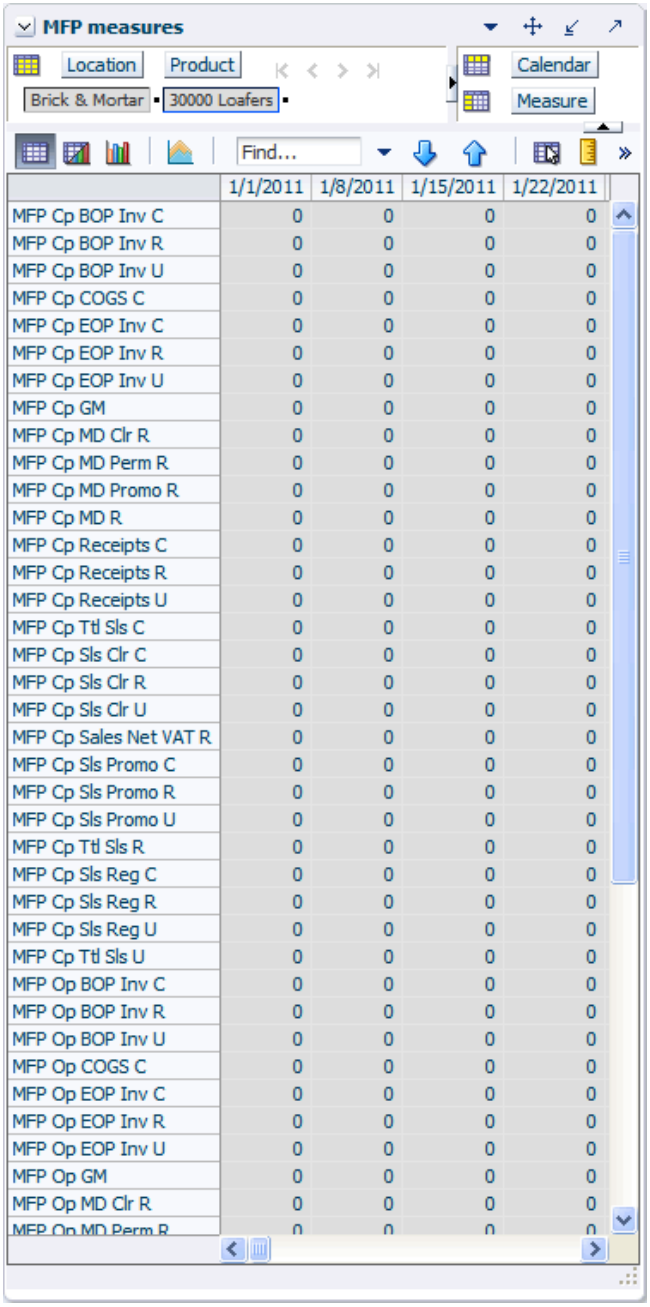
Table 9–3 (Cont.) Item Planning Measures View Measures

Measure	Description
Wp EOP Reg U	Working Plan End of Period Regular Inventory Units.
Wp Inv Adj Clr C	Working Plan adjusted inventory cost for clearance.
Wp Inv Adj Clr R	Working Plan adjusted inventory retail for clearance.
Wp Inv Adj Clr U	Working Plan adjusted inventory units for clearance.
Wp Inv Adj Reg C	Working Plan adjusted inventory cost for regular price.
Wp Inv Adj Reg R	Working Plan adjusted inventory retail for regular price.
Wp Inv Adj Reg U	Working Plan adjusted inventory units for regular price.
Wp MD Allowance R	Working Plan Markdown Allowances Retail.
Wp On Order C	Working Plan On Order Cost.
Wp On Order R	Working Plan On Order Retail.
Wp On Order U	Working Plan On Order Units.
Wp Receipts C	Working Plan Receipts Cost.
Wp Receipts R	Working Plan Receipts Retail.
Wp Receipts U	Working Plan Receipts Units.
Wp Sls Clr C	Working Plan Clearance Sales Cost.
Wp Sls Clr R	Working Plan Clearance Sales Retail.
Wp Sls Clr U	Working Plan Clearance Sales Units.
Wp Sls Promo C	Working Plan Promotional Sales Cost.
Wp Sls Promo R	Working Plan Promotional Sales Retail.
Wp Sls Promo U	Working Plan Promotional Sales Units.
Wp Sls Reg C	Working Plan Regular Sales Cost.
Wp Sls Reg R	Working Plan Regular Sales Retail.
Wp Sls Reg U	Working Plan Regular Sales Units.

MFP Measures View

Use the MFP Measures view to validate that the MFP data was updated in the batch process.

Figure 9–8 MFP Measures View



	1/1/2011	1/8/2011	1/15/2011	1/22/2011
MFP Cp BOP Inv C	0	0	0	0
MFP Cp BOP Inv R	0	0	0	0
MFP Cp BOP Inv U	0	0	0	0
MFP Cp COGS C	0	0	0	0
MFP Cp EOP Inv C	0	0	0	0
MFP Cp EOP Inv R	0	0	0	0
MFP Cp EOP Inv U	0	0	0	0
MFP Cp GM	0	0	0	0
MFP Cp MD Clr R	0	0	0	0
MFP Cp MD Perm R	0	0	0	0
MFP Cp MD Promo R	0	0	0	0
MFP Cp MD R	0	0	0	0
MFP Cp Receipts C	0	0	0	0
MFP Cp Receipts R	0	0	0	0
MFP Cp Receipts U	0	0	0	0
MFP Cp Ttl Sls C	0	0	0	0
MFP Cp Sls Clr C	0	0	0	0
MFP Cp Sls Clr R	0	0	0	0
MFP Cp Sls Clr U	0	0	0	0
MFP Cp Sales Net VAT R	0	0	0	0
MFP Cp Sls Promo C	0	0	0	0
MFP Cp Sls Promo R	0	0	0	0
MFP Cp Sls Promo U	0	0	0	0
MFP Cp Ttl Sls R	0	0	0	0
MFP Cp Sls Reg C	0	0	0	0
MFP Cp Sls Reg R	0	0	0	0
MFP Cp Sls Reg U	0	0	0	0
MFP Cp Ttl Sls U	0	0	0	0
MFP Op BOP Inv C	0	0	0	0
MFP Op BOP Inv R	0	0	0	0
MFP Op BOP Inv U	0	0	0	0
MFP Op COGS C	0	0	0	0
MFP Op EOP Inv C	0	0	0	0
MFP Op EOP Inv R	0	0	0	0
MFP Op EOP Inv U	0	0	0	0
MFP Op GM	0	0	0	0
MFP Op MD Clr R	0	0	0	0
MFP Op MD Perm R	0	0	0	0

The following table lists the measures available on this view.

Table 9–4 MFP Measures View Measures

Measure	Description
MFP Cp BOP Inv C	MFP Current Plan Beginning of Period Inventory Cost.
MFP Cp BOP Inv R	MFP Current Plan Beginning of Period Inventory Retail.
MFP Cp BOP Inv U	MFP Current Plan Beginning of Period Inventory Units.
MFP Cp COGS C	MFP Current Plan Cost of Goods Sold Cost.
MFP Cp EOP Inv C	MFP Current Plan End of Period Inventory Cost.

Table 9–4 (Cont.) MFP Measures View Measures

Measure	Description
MFP Cp EOP Inv R	MFP Current Plan End of Period Inventory Retail.
MFP Cp EOP Inv U	MFP Current Plan End of Period Inventory Units.
MFP Cp GPM	MFP Current Plan Gross Margin.
MFP Cp MD Clr R	MFP Current Plan Clearance Markdowns Retail.
MFP Cp MD Perm R	MFP Current Plan Permanent Markdowns Retail.
MFP Cp MD Promo R	MFP Current Plan Promotional Markdowns Retail.
MFP Cp MD R	MFP Current Plan Total Markdowns (Clearance + Promotional + Regular) Retail.
MFP Cp Receipts C	MFP Current Plan Receipts Cost.
MFP Cp Receipts R	MFP Current Plan Receipts Retail.
MFP Cp Receipts U	MFP Current Plan Receipts Units.
MFP Cp Ttl Sls C	MFP Current Plan Total Sales Cost.
MFP Cp Sls Clr C	MFP Current Plan Clearance Sales Cost.
MFP Cp Sls Clr R	MFP Current Plan Clearance Sales Retail.
MFP Cp Sls Clr U	MFP Current Plan Clearance Sales Units.
MFP Cp Sales Net VAT R	MFP Current Plan Sales Net Value Added Tax Retail.
MFP Cp Sls Promo C	MFP Current Plan Promotional Sales Cost.
MFP Cp Sls Promo R	MFP Current Plan Promotional Sales Retail.
MFP Cp Sls Promo U	MFP Current Plan Promotional Sales Units.
MFP Cp Ttl Sls R	MFP Current Plan Total Sales Retail.
MFP Cp Sls Reg C	MFP Current Plan Regular Sales Cost.
MFP Cp Sls Reg R	MFP Current Plan Regular Sales Retail.
MFP Cp Sls Reg U	MFP Current Plan Regular Sales Units.
MFP Cp Ttl Sls U	MFP Current Plan Total Sales Units.
MFP Op BOP Inv C	MFP Original Plan Beginning of Period Inventory Cost.
MFP Op BOP Inv R	MFP Original Plan Beginning of Period Inventory Retail.
MFP Op BOP Inv U	MFP Original Plan Beginning of Period Inventory Units.
MFP Op COGS C	MFP Original Plan Cost of Goods Sold Cost.
MFP Op EOP Inv C	MFP Original Plan End of Period Inventory Cost.
MFP Op EOP Inv R	MFP Original Plan End of Period Inventory Retail.
MFP Op EOP Inv U	MFP Original Plan End of Period Inventory Units.
MFP Op GM	MFP Original Plan Gross Margin.
MFP Op MD Clr R	MFP Original Plan Clearance Markdowns Retail.
MFP Op MD Perm R	MFP Original Plan Permanent Markdowns Retail.
MFP Op MD Promo R	MFP Original Plan Promotional Markdowns Retail.
MFP Op MD R	MFP Original Plan Total Markdowns (Clearance + Promotional + Regular) Retail.
MFP Op Receipts C	MFP Original Plan Receipts Cost.

Table 9–4 (Cont.) MFP Measures View Measures

Measure	Description
MFP Op Receipts R	MFP Original Plan Receipts Retail.
MFP Op Receipts U	MFP Original Plan Receipts Units.
MFP Op Ttl Sls C	MFP Original Plan Total Sales Cost.
MFP Op Sls Clr C	MFP Original Plan Clearance Sales Cost.
MFP Op Sls Clr R	MFP Original Plan Clearance Sales Retail.
MFP Op Sls Clr U	MFP Original Plan Clearance Sales Units.
MFP Op Sales Net VAT R	MFP Original Plan Sales Net Value Added Tax Retail.
MFP Op Sls Promo C	MFP Original Plan Promotional Sales Cost.
MFP Op Sls Promo R	MFP Original Plan Promotional Sales Retail.
MFP Op Sls Promo U	MFP Original Plan Promotional Sales Units.
MFP Op Ttl Sls R	MFP Original Plan Total Sales Retail.
MFP Op Sls Reg C	MFP Original Plan Regular Sales Cost.
MFP Op Sls Reg R	MFP Original Plan Regular Sales Retail.
MFP Op Sls Reg U	MFP Original Plan Regular Sales Units.
MFP Op Ttl Sls U	MFP Original Plan Total Sales Units.