Oracle Retail Assortment Planning (AP) Release 15.0 is available only using the RPAS Fusion Client User Interface.

Functional Overview

The assortment planning process establishes the breadth and depth of the product offering (including the color/fragrance/flavor and size level), for Points-of-Commerce (stores, sites, applications, catalogs, social commerce networks, wholesale/franchise locations/groups, and so on) and for a given period of time. The analysis of past performance such as color effectiveness, trend adoption, size preferences, customer segmentation, styling visualization, in-store placement, and geographic selling are key inputs into revising a currently planned/executed assortment or building a new assortment.

Assortment Planning is a role-based solution enabling each role (Senior Merchant, Buyer/Trader, Planner, and so on) to use the solution to develop, record, and track their assortment decisions and strategies. A role-based user can do the following:

- Decide the breadth and depth of the assortment by Point-of-Commerce (stores, sites, applications, catalogs, social commerce networks, wholesale/franchise locations/groups, and so on).
- Identify the number of styles or items and the number of options (colors/fragrances/flavors) per assorted style or item.
- Evaluate both the sales/margin potential as well as the sales/inventory capacity for a single or group of Points-of-Commerce.
- Create a shopping list for use when going to market, meeting with designers/vendors, reviewing Look Books, and so on, that can be used to flesh out the assortment as the user make decisions.
- View the look and feel and of the assortment from the customer's perspective as a collection and at the detail level.
- Determine where to make receipt and inventory investments in the assortment.
- Create a buy plan (sales, margin, inventory, receipts, and sell-thru) to guide the execution of the assortment and track its results.
- Align the assortment plan with the Merchandise Financial Plan (MFP) and/or Location Plan (LP).
- Re-trend the assortment plan to make in-season assortment decisions.
- Assign the color runs (or fragrance of format groups) to be carried for each style/item.
- Set up (if not using Oracle Retail Size Profile Optimization (SPO)) or review size and pack profiles to be used when executing the assortment in each Point-of-Commerce.
- Use Oracle Retail Science to convert the Buy Plan’s receipt quantities into a style-color-size receipt plan in eaches and/or in pre-packs.
- Use the Weekly/Performance analysis to apply what has been learned from in-store and prior assortments when creating new or revising planned assortments.
- Execute assortment decisions through the packaged integration.

There are several processes by which an assortment can be established in this solution:

- Collaborate with internal design teams to develop house brand assortments.
- Take an initial super-set is supplied by Product Lifecycle Management (PLM) solutions and then choose from a super-set of options in AP.
- Select options and request adjustments to be made from an assortment offered by third-party vendors.
- Create a global assortment from which each regional business unit selects a subset to carry in their region.
- For the wholly owned, wholesale, and franchise model:
  - Build an assortment for wholly owned Points-of-Commerce (stores, sites, applications, networks, and so on).
  - Recommend an assortment for wholesale customers.
  - Identify an assortment to be sold through franchised locations.
- For omni-channel, where a user identifies a super-set of assortment options and then determines which options by location will be available for the following:
  - Both sale and fulfillment
  - Order creation only (and potentially for demonstration/trying on)
  - Fulfillment only

All of the Oracle Retail Planning solutions are highly configurable to enable each retailer’s assortment business-specific, successful business methods to be embedded in the solution and business process. Oracle Retail has identified several keys to success with the Assortment Planning solution, including:

- Align with the Merchandising Plan - The Assortment Plan must be aligned with the Merchandise Financial Plan (MFP) and/or Location Plan (LP) to insure the inventory investment required to support the Assortment Plan is financially viable and risk approved (AP offers packaged and configurable integration that links assortment plans to financial plans).
- Process Flexibility - Assortment planning processes vary widely within each retailer and across retailers. The business process must be flexible so that merchants can keep current with fashion trends, market shifts, economic changes, and customer preferences.
- Build the assortment in layers - Build and view the assortment in attribute-based layers. Evaluate the assortment by brand, color, color family, fabric, silhouette, fit, length, embellishment, trend, and so on, and compare the prevalence by attribute
to recent trend, last season, last floor set, customer panels and social network, or Endeca search results.

- Plan the full lifecycle - Plan the entire lifecycle, from launch to normal selling to clearance and exit. (The AP solution plans the entire life of the assortment and integrates with its promotion and clearance pricing solutions to maximize the assortment’s profitability.)

- Plan the assortment visually. Because customers do not shop from a spreadsheet, Oracle Retail believes that merchants should not have to plan the assortment with only a spreadsheet. Oracle Retail’s Assortment Planning solutions enable the merchant to view the assortment from silhouettes at the beginning to finished goods at the end.

- Plan once and execute everywhere - Be able to make a decision in Assortment Planning and execute it everywhere without manual reentry of the decision in multiple solutions. The Oracle Retail Assortment Planning solution can, depending on the implementation, integrate data with the Oracle Retail Merchandising System, as well as, Oracle Retail’s Planning, Clearance Optimization, Size/Pack Optimization, and Allocation/Replenishment solutions.

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**Note:** See the Oracle Retail Assortment Planning Installation Guide for compatible integrated Oracle Retail applications.

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These same integration options, as most are configurable, can be used for integration with non-Oracle solutions as well.

### Overview of the Fashion Planning Bundle

The Fashion Planning Bundle is the integration of Item Planning (IP), Item Planning configured for Clearance Optimization Engine (IP-COE), Assortment Planning (AP), Merchandise Financial Planning (MFP), and Size Profile Optimization (SPO) as a full-suite planning solution for fashion retailers.

### Hardware and Software Requirements

See the Oracle Retail Assortment Planning Installation Guide for information about the following:

- Hardware and software requirements
- Oracle Retail application software compatibility information

### Functional Enhancements

The following functional enhancements are included in AP 15.0:

### Packaged Assortment Planning for Wholesale and Franchise Accounts

Oracle Retail Assortment Planning, out of the box, has always supported assortment creation and planning for wholly owned stores, web sites, mobile applications, and social commerce sites. Assortment planning for wholesale and franchise accounts is added in 15.0. While planning for wholesale and franchise accounts could have been configured on-site in prior releases, this entailed additional implementation expense.
However, with this release, support for wholesale and franchise accounts (with measures, rules and views tailored to wholesale/franchise accounts) is packaged with the Generally Available (GA) release of Assortment Planning. This functionality is optional.

The three primary approaches to building and planning assortments in the Assortment Planning solution are:

- **Brick & Mortar** - Wholly owned stores, kiosks, and so on.
- **Direct** - Wholly owned .com sites, mobile commerce application, Pinterest Buying Pins, catalogs, and so on.
- **Wholesale/franchise accounts** where a retailer (also known as the wholesaler) sells inventory to another retailer or to a franchiser and the wholesaler does not absorb all of the markdowns, and so on.

A retailer is able to create and plan assortments for clusters of all three commerce approaches: Brick & Mortar, Direct, and Wholesale/Franchise Accounts in a single workbook. This can save steps for Planners and Merchants plus reduce the Total Cost of Ownership (TCO) as the Wholesale/Franchise approach now comes packaged as opposed to configuring it from scratch, on-site.

For more information, see the *Oracle Retail Assortment Planning User Guide*.

### Use Drag and Drop to Save Steps in the Planning Process

The Oracle Retail Predictive Application Server (RPAS) Fusion Client is a web-based client that come packaged with the RPAS Platform underpinning the Oracle Retail Assortment Planning solution. It provides the Merchant or Planner with a new way to interact with their assortment plan, by dragging and dropping.

Previously, the Fusion Client enabled you to use Drag and Drop when adding Looks to a workbook or to adding/removing measures from a worksheet, and so on, but Drag and Drop had never previously been possible in the core pivot table worksheet. Drag and Drop should enable you to save time by dragging and dropping one or more styles, style-colors, or fixtures (either adding or removing) in the following use cases in the GA solution:

- To add or to remove styles to/from a Shopping List
- To add or to remove style colors to/from each Cluster's Wedge Assortment from the Shopping List
- To add or to remove Fixtures to/from a Look (A Look can be thought of as a Floor Set, Theme, Season, and so on)

Additional use cases can be added using the Oracle Retail Predictive Application Server Configuration Tools. For more information, see the *Oracle Retail Predictive Application Server Configuration Tools User Guide*.

For more information, see the *Oracle Retail Assortment Planning User Guide*.

### Color Level Sales Planning Process Improvement

In the Build the Wedge process, the process of spreading the subclass/cluster level sales plan down to the style-color level is improved through the use of loaded, set or calculated color weights. This enhancement can help users to save steps and time in the planning process.

For more information, see the *Oracle Retail Assortment Planning User Guide***.
Status Calculation for Style and Style-Colors

The Style/Style-Color Status logic is improved in the Shopping List and Wedge. The introduction of Style/Style-Color Intro and Exit dates simplify the definition of item status compared with the assortment duration where the item is carried.

For more information, see the Oracle Retail Assortment Planning User Guide.

RPAS Functional Enhancements Applicable to AP

These functional requirements are added to the RPAS Fusion Client in this release:

- Images can be exported to Microsoft Excel. Visual planning now enables the export of images with the pivot table to Excel. Previously, only the URL was exported.
- An iPad can be used with Assortment Planning. An assortment planner can use the RPAS Fusion Client on an iPad. No additional software is required. The Safari browser is used on an iPad to access the solution.
- User can zoom into the focus images in a pop-up window. A zoom-in capability is added to the larger scale images utilized in a pop-up window so users can get a close look at the fabric, pattern, detail, and so on, in the item or fabric image.

For more information, see the Oracle Retail Predictive Application Server Release Notes.

Performance Improvements

The following enhancements help to improve the speed with which the Merchant and/or Planner complete the Assortment Planning process:

- Look Maintenance, Clustering, and the Wedge Approval/Commit processes are improved by removing the need to run a batch script to define the large prerange mask. The overall domain size is reduced by removing the large prerange mask which also improves AP performance.
- Complex workbooks (such as Clustering, Fill the Wedge, and so on) build and refresh faster as the RPAS Platform enhancements to the Prerange Mask functionality are added to the Assortment Planning configuration. Instead of one huge mask, multiple smaller masks (that execute more quickly) are added to the configuration. RPAS previously permitted only one mask per workbook, but now permits multiple masks.
- Complex planning processes (such as, Seeding, Filling the Wedge, Approving the Plan, and so on) complete faster due to improvements to the underlying architecture of the automated planning process. This updated architecture is also enabled in the Assortment Planning template.
- Adjustments are made to improve the performance of most process groups and workbooks.
## Noteworthy Defect Fixes

The following noteworthy defect fixes are included in this release:

<table>
<thead>
<tr>
<th>Affected Component</th>
<th>Fixed Issue/Defect</th>
<th>Defect Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configuration</td>
<td>The Complex Pack hierarchy PCCT is removed. It was not used in any measures, rules, or workbooks.</td>
<td>20671831</td>
</tr>
</tbody>
</table>
| Configuration      | The GA configuration was found to have inconsistent naming conventions which needed to be fixed where the majority of the Majors had the same database and file names as that of their measure name. Also, two measures did not have their database and/or file names the same as that of measure names:  
  - Measures with different database names:  
    - BUCPSIsClrR  
    - BWWPNbrSkupV  
    - BPCPSIsRgPrR  
    - BPCPSIsRgPrU  
    - BPCPSIsRgPrC  
    - DRLYGMPR  
    - MFPCPSIsRgPrU  
    - BPCSGMPR  
    - MFPCPSIsRgPrR  
  - Measures with different file names:  
    - ADATClstAtt2Tx  
    - ADATClstAtt1Tx  
 | 21178365          |
| Configuration Rules | The sldvatrrvaltx measure was at the wrong intersection: pposattrclstskuglook. The sldvatrrvaltx measure is now at the scls level. | 22099722      |
| Configuration Rules | The Cluster Labels were not displaying the same value in the POC Analysis, Cluster Results, and Build Wedge, Review History by Attribute, workbooks. For example, Look Group 1:  
  POC Analysis = Z / A / ETH1  
  Cluster Results = Z / /  
  Review History/Plans = Not Used  
<p>| 21572135, 22099731 |</p>
<table>
<thead>
<tr>
<th>Affected Component</th>
<th>Fixed Issue/Defect</th>
<th>Defect Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configuration Rules</td>
<td>The ranking based on sales, in the Buy Plan by Color worksheet, was not correct. The former logic ranked the color within the style-color, and the result was always one and therefore meaningless. The logic now ranks the color in each subclass, instead of for each style-color.</td>
<td>21609041</td>
</tr>
<tr>
<td>Configuration Rules</td>
<td>When adding a DPM position in the Look Maintenance &gt; Assign Strategies worksheet, the Strategies measure was not populated after adding the new position. The drop-down box was empty. This picklist was using the new AP picklist function requiring the Boolean mask to specify which positions to allow the picklist to populate. This mask was being set only in the load rule group preventing the newly created DPM position to be populated with the picklist. This issue is resolved by having this Boolean mask set in the Calc rule group.</td>
<td>22099750</td>
</tr>
<tr>
<td>Configuration Rules</td>
<td>The sales curve label was being updated in the Look Maintenance workbook instead of directly in the Buying Plan. This means, in the previous steps after changing the labels in the Curve Library, the user would have to open and commit the Look Maintenance. The sales curve label update is now being done directly in the Buying Plan during the workbook build. This means once the labels are changed in the Curve Library, the user can directly go to Buying Plan to see the update.</td>
<td>22099756</td>
</tr>
<tr>
<td>Configuration Rules</td>
<td>The APWPMARKUPP calculation formula was incorrect. APWPMarkupp = (APWPPriceV - APWPCostV) / APWPCostV was incorrect. It is corrected to APWPMarkupp = (APWPPriceV - APWPCostV) / APWPPriceV where Price should be the denominator. The APWPMarkupp flex calc is updated: expression 1: APWPMarkupp = (APWPPriceV - APWPCostV) / APWPPriceV expression 2: APWPPriceV = APWPCostV / (1 - APWPMarkupp) expression 3: APWPCostV = APWPPriceV - (APWPMarkupp * APWPPriceV)</td>
<td>22099762</td>
</tr>
<tr>
<td>Configuration Rules</td>
<td>The size of the prerange mask measures for the Shopping List, Build the Wedge, Buying Plan and Size &amp; Pack workbooks needed to be reduced to improve their build performance. The issue is fixed by the inclusion of a Calendar wizard in the Buying Plan where it now shows the selected Look(s) minimum start week, including the prior two weeks from the start date and all the remaining future weeks in the domain.</td>
<td>22099771</td>
</tr>
<tr>
<td>Custom Workbook</td>
<td>In the Clustering workbook, the Seed Sister PoC custom menu did not recalculate the WP Comb Index to Avg and WP Cluster. The custom menu rules are fixed to correctly calculate the WP Comb Index to Avg and WP Cluster for the PoC seeded from the sister PoC.</td>
<td>21773937, 22099741</td>
</tr>
</tbody>
</table>
### Known Issue

The following table contains a known issue that has been identified for the current release:

<table>
<thead>
<tr>
<th>Affected Component</th>
<th>Fixed Issue/Defect</th>
<th>Defect Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plug-ins</td>
<td>TransformSpread, used in the workbook rules, could not handle the NA flip. When a Boolean measure's NA value was true and was used as a source measure in the transformspread rule, the result was not correct. This was common for spreading Boolean type measure where a small set of workbook data could cause the measure's NA value to flip, in which case, the function did not provide correct output data. The TransformSpreadExpr.cpp and TransformSpreadExprST.xml files are modified. Now, measures with a flipped NA value work correctly.</td>
<td>22128905</td>
</tr>
</tbody>
</table>

### Related Documentation

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

- Oracle Retail Assortment Planning Implementation Guide
- Oracle Retail Assortment Planning Installation Guide
- Oracle Retail Assortment Planning User Guide for the RPAS Fusion Client
- Oracle Retail Batch Script Architecture Implementation Guide

For more information on the Fashion Planning Bundle applications, see the following documents:

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

For more information about the RPAS Fusion Client, see the documents in the Oracle Retail Predictive Application Server documentation set.
Supplemental Training on My Oracle Support

The following document is available through My Oracle Support. Access My Oracle Support at the following URL:

https://support.oracle.com

Release Readiness Transfer of Information (TOI) Recordings (Doc ID 732026.1)

Online training is available to Oracle supported customers at product release. These online courses provide release-specific product knowledge that enables your functional and technical teams to plan, implement and/or upgrade and support Oracle Retail applications effectively and efficiently. Note that Oracle Retail products with minor updates often do not have an associated TOI.

Previous Releases

For information on previous Oracle Retail Assortment Planning release enhancements and additional information, refer to the release notes and documentation that accompany the previous release.

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Value-Added Reseller (VAR) Language

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