Oracle® Retail Assortment Planning Cloud Service

User Guide

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Oracle Retail Assortment Planning Cloud Service User Guide, Release 25.1.101.0

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Preface

This document describes the Oracle Retail Assortment Planning Cloud Service user interface. It provides step-by-step instructions to complete most tasks that can be performed through the user interface.

Audience

This document is for users of Oracle Retail Assortment Planning Cloud Service.

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1
Introduction

The Assortment Planning Cloud Service (APCS) process establishes the breadth and depth of the product offering (including the color/fragrance/flavor and size level), for Points-of-Commerce and for a given period of time. The analysis of past performance such as color effectiveness, trend adoption, styling visualization, in-store placement, and geographic selling are key inputs into revising a currently planned/executed assortment or building a new assortment. The simplified business process is automated to create and define assortments based on trend and historical data with an option for you to override.

The APCS process starts with Creating Assortment Strategy by reviewing history, forecast and Oracle Retail Merchandise Financial Planning Cloud Service (MFPCS) targets, determining the option count for a given season, receiving science-backed assortment recommendations, reviewing, and optimizing the assortment to meet one or more organizational Key Performance Indicators (KPIs) and planning Buy Quantity for a given season.

In Item Planning Pre-season, planned buy quantity is further expanded and reviewed at week level thus creating weekly sales, receipts and Inventory plans. In Item Planning In-season, trends are monitored, the approved pre-season plans are reviewed against the actuals, forecast generated for the remaining season and sales, Receipts and Inventory plans are adjusted to meet the Organizational goals and emerging market trends.

APCS helps the business to anticipate and proactively manage exceptions by utilizing robust real-time alerts to highlight and focus your attention on item issues that need immediate attention. In this way, you can manage by exception versus searching through entire data sets to locate problems, saving time and resources to focus on important issues.

It provides a separate route so you can plan basic lines in one go across multiple assortment periods and focus more on seasonal items every assortment period. It also provides a dashboard, which delivers a visual tool to quickly analyze in-season item trends based on various KPIs, such as Sales, Gross Margin, and Sell-Thru and also exceptions in the business.

The Assortment Planning Cloud Service activity consists of these tasks:

- Assortment Planning
- Item Planning - Basics
- Item Planning

These tasks focus on reviewing history, forecasts, and MFPCS targets by determining the number of options, reviewing the best attributes, creating placeholder positions, and creating shipping lists while generating science-backed assortment recommendations.

Assortment Planning focuses on leveraging science and the best of the Buyer/Planner strategy to make assortment decisions by leveraging AI Foundation so that the best-ranked assortments are considered and to provide tools to drive assortment recommendations aligned with Business Objectives.

Visual planning provides a near real-time shopping experience, flexibility, and robustness for planner flexibility to override the recommended options, create a high-level buy plan, and approve the assortment.

Item Planning - Basics focuses on creating an Item Plan for basic/continuous items across multiple assortment periods in one go. Item Planning focuses on creating a pre-season plan in

advance of when the merchandise is going to be sold, and In-season focuses on adjusting the original plan-based sales once the season has started. It also factors in new knowledge about the assortment, completion, promotions, or other factors that were not known during Item Planning.

Assortment Planning Cloud Service leverages the features of the powerful Oracle Retail Predictive Application Server Cloud Edition (RPASCE) platform, including AI Foundation recommended forecasts, assortments, visual planning, and alert management, and a powerful Oracle Data Visualization tool to slice and dice data and merge data for various levels of audiences in the organization, providing the platform to draw insights and make correct decisions.

Note:

Data Visualization reports are available out-of-the-box for the AP application. These reports allow you to analyze KPIs visually leveraging the best reporting capabilities Oracle offers. The reports provided out-of-the-box are expected to serve as a starting point for users. You can then further build required reports tailored to their specific needs. These out-of-the-box reports are included as part of the OAS catalogue. To access the reports, navigate to the Shared folder, then the AI Foundation folder and finally the AP folder.

Within the AP reports, you can view following visualizations:

- Product Attribute Overview
- Sales Review
- Top 10 Items
- Sales Analysis by District
- Location Analysis

Key Features

The following is a summary of the key features of Assortment Planning Cloud Service.

Last Year Mapping

Assortment Planning Cloud Service provides flexibility for you to use Last Year (LY) data, which is especially useful for some fast fashion categories. Last Year data is easily accessible to analyze and compare data. You can perform the following:

- Analyze history/ review history by attributes.
- Seed in Create Assortment workspace, Determine # of Options step.
- Calculate the recommended assortment.

Item Status

Item status is determined based on thresholds set by you to determine the carryover status. All placeholders created are considered for New status. The target carryover is automatically determined by the threshold carryover units defined at the subclass/cluster level. A mandatory

flag is included in the Create Assortment process that helps the Assortment Recommendation Engine recommend the mandatory option.

Target Options Calculation/Rate of Sales Auto Calculation

The Assortment Planning Cloud Service Target Options calculation includes a threshold parameter (LY Sales U Min Threshold, LY Receipts U Min Threshold) which allows you to remove special or one off-buys to optimize historical data used within the Rate of Sales (ROS) calculation.

Example: There are 16 options to include in the ROS calculation but, 4 out of 16 were small special buys; think surprise and delight items (for example, a retailer may buy a few luxury pieces for assortment presence with minimal receipts). When calculating ROS, you would only want to include 12 options.

WP Rate of Sales will populate with the recommended Rate of Sales during the seeding process. Recommend Rate of Sales is calculated utilizing the forecast or last year sales, if the forecast is not available. The Rate of Sale calculation takes into account the number of stores that a style was allocated to with valid inventory to adjust for under-performing locations with zero sales. There is a WP Rate of Sales measure for you to manually adjust after the seed if necessary.

FP ROS Recommended is calculated at Assortment Period x Style-Color x Cluster.

FP ROS Recommended is calculated using a sequence of evaluations for each item in the following order:

Table 1-1 Calculation Order for FP ROS

Order	If	Then
1	Item Forecast is available	FP ROS Recommended = Fcst Sales U / LY Option Counter
2	Item Forecast is not available	FP ROS Recommended = LY Sales U / LY Option Counter
3	The previous evaluations = 0 for existing item	FP ROS Recommended at Item = FP ROS Recommended at SubClass
4	New Item with Like Item defined	FP ROS Recommended = Like Item's ROS Recommended
5	New Item with No Like Item Defined	FP ROS Recommended = 0

LY Option Counter = count of the number of Style-Colors / Stores with Sales (LY Sales U > 0) and inventory greater than the threshold (LY EOP U > EOP U Min Threshold)

Fcst Sales U: Forecast Sales units received from AI Foundation

- LY Sales U: Reg + Promo Sales units from last year or recent history
- LY # of Stores: maximum number (#) of stores within the cluster that a style-color was received in:
  - Focusing on receipts ensures that unproductive stores are taken into account
- LY # of Options: maximum number of options sold in stores within the cluster
- WP ROS: populated with Recommended ROS during the seed process, will recalculate with edits to WP total options

Demand Transference

Demand Transference (DT) logic leverages AI Foundation to forecast the effect on sales of all the items in the assortment when items are added, removed, or swapped from the assortment. DT enables you to try out several different assortments to find one that best meets the goals of the assortment. DT uses the item similarity score, item elasticity, and attribute weights as key drivers to determine the profitable items.

The Optimization engine allows you to fine-tune the assortment plan to meet a specific KPI such as improved Sales U/Sales R/Gross Margin or simply altering the assortment plans to meet MFP targets or any other strategic targets determined.

Item Lifecycle Planning

Assortment Planning Cloud Service facilitates the management of an item through its lifecycle, from the Item Planning subclass-level target-setting through in-season management. It enables retailers to quickly realize benefits and keep up with ever-changing customer expectations. It includes the following capabilities:

- Setting targets, identifying breakout of new versus carryover products, determining the number of new options, and setting sales targets by item.
- Target creation offers complete flexibility that aligns with the retailer's business processes. The targets can come from MFP, Forecast, or the Assortment Plan created during the pre-season.
- In-season, Item Planning provides the ability to reforecast and adjust plans to meet emerging market trends and provides subclass-level open-to-buy reconciliation to optimize the placement of inventory based on customer fulfillment needs.

Item Planning - Basics

Assortment Planning Cloud Service facilitates the management of basic/continuous items across multiple seasons through its lifecycle, from the Item Planning subclass-level target-setting through in-season management down to the item/store level. It enables retailers to quickly realize benefits and keep up with ever-changing customer expectations. It also enables retailers to plan basic items across multiple assortment periods or multiple seasons in one workspace instead of having to repeat the same activity for the same set of items across multiple workspaces. It includes the following capabilities:

- Setting targets, identifying breakout of new versus carryover product, determining the number of new options, and creating a sales plan across multiple seasons by item. The targets can come from Forecast, MFP, and Assortment Plans created during pre-season.
- Item plans created in the Item Planning - Basics workbook can be aggregated with other assorted items for a selected season in IP Pre-season and IP In-season workbooks.
- If the total department plans exceed the targets in seasonal workbooks, you have the flexibility to override the plans for basic lines in seasonal workbooks to meet the department targets.
- Since basics/continuous items span across multiple seasons, you can plan and finalize the assortments, plan the needed Buy quantity once in Assortment Planning to last multiple seasons, and spread the sales across multiple seasons in the Item-Planning Basics workbook.
- In the subsequent assortment periods, if the basic assorted line has an on-hand inventory and has a future item life cycle end date, the item will be automatically marked as basic-

carryover and eventually gets a Carryover status for the item. You can mark this as an eligible item and now focus only on seasonal lines. The Assortment Recommendation Engine and Demand Transference processes give the Basic-Carryover item the highest priority after mandatory items.

Assortment Plan - Option Planning

Assortment Planning Cloud Service provides detailed Options planning capabilities to facilitate plan creation and a smart starting point for more detailed Item Planning. The following capabilities are included:

- Ability to carry over items from prior assortments
- Establish item-level selling patterns using a variety of sources including like item, last year history, curve library, or a demand forecast
- Assign product attributes
- Add images for a visual options planning experience
- Reconcile against targets

Exception Management in Item Planning

Assortment Planning Cloud Service includes additional capabilities for the existing standard, exception-based retailing processes with clear resolution pathways towards prioritized, value-based activities. By automating best practices and adopting exception-based reporting, retailers create more space for innovative and artistic thinking. In addition to the automated alert navigation to quickly find and address exceptions and control where alerts should be evaluated, an Exception Dashboard provides a dynamic, visual starting point for exception management.

Exception management processes include guidance to alert for Assortment period overlap, Product Attribute, carryover options minimum, new options minimum, Shop Option, Mandatory option inclusion, Attribute not assigned, receipts difference to sales, in-season projected inventory overages, low sales trends, in-season immediate inventory need, and future inventory needs.

Nested Dynamic Rollup

Nested Dynamic Rollup is a configurable option available to view/edit plans/subtotals at various levels. The Define Product Rollup view is used to select product attributes to view in an alternate hierarchy. Nested product attribute rollup is provided with three levels. You can set up to three different combinations for nested rollup with a maximum of three levels in each combination. Nesting of dynamic attributes is a configurable option.

For example: As a first combination, select Brand as a Level 1, Color as Level 2, and Fabric as Level 3 by clicking the list of attributes available at that category.

This allows you to rollup your items by brand, then color inside each brand and then by fabric inside each color. This feature also allows you to view subtotals for each of the levels. You can edit subtotals and spread the values to all the associated child positions.

You can analyze, review and edit the proposed assortment based on important attributes. You may select up to three attributes at a time for the dynamic rollup.

Dashboard

The Assortment Planning Dashboard focuses on current In-season metrics which allows the dashboard to provide a quick summary view of plans/trends before diving into each planning template. This dashboard communicates to you about the overall health of the business, trends, the high-performing and low performing lines based on the pre-determined metrics. You decide the metrics you would want to watch the trend for on the next online day. The overnight batch run gets the dashboard ready for you to analyze first thing in the morning as soon as you log in to the application.

Four dashboard profiles are provided for APCS:

- **Weekly Trends (Key Items)** - The Weekly Trends for Key Items shows the graphical view of the key metrics by calendar. It will list the High performing and Low performing *n* number of items where the number of items for each subclass is a configurable value. The trends are shown for pre-determined metrics Sales U/R, Gross Margin, Gross Margin %, and Sell Thru %.
- **Product Trends (Key Items)** - The Product Trends for Key Items shows the information of products sorted by the selected metric. This provides a graphical view of the top items to bottom items in the order. The metrics provided here are Sell Thru %, Gross Margin, Gross Margin %, and Sales U/R to be able to see the order of top to bottom items. You are able to sort the measure to review the product ranks in ascending or descending order for the pre-determined calendar period.
- **Product Class Trends** - The Class Performance provides the true total value of the class. This view enables you to review the true performance of the products at the class level and higher. The metrics provided here are Sell Thru %, Gross Margin, Gross Margin %, and Sales U/R.
- **Exceptions (Key Items)** - The Exceptions profile shows the exceptions, if any, for the High and Low performing items listed in the dashboard. Real-time alerts are provided in this dashboard for various business conditions. The exception dashboard provides a contextual launch into the workbooks for further analysis and resolution of real-time alerts.

Assortment Planning Cloud Service Benefits

Assortment Planning Cloud Service provides the following benefits:

- Simple and highly visual assortment business process to create and define assortments based on trend, history data, customer, and attribute preferences.
- Smart Assortment recommendations backed by AI Foundation prioritizing preferences set by the business user, thereby simplifying the assortment creation process.
- Streamlined placeholder creation including like-item capabilities and attribute management.
- Demand Transference capabilities to generate cluster-level optimized assortment recommendations.
- Simplified workflow for Basic/Continuous items across multiple seasons.
- Exception-driven Item Planning to manage key item performance and to break items down to Style-Color using size profiles.
- Dashboard to analyze the ups and downs in Sales, GM, and EOP and review Item Planning and in-season exceptions.

- Manages the entire lifecycle of an item, including item buy planning and in-season trend analysis.
- Unified financial, assortment, and item strategies. Open-to-Buy Reconciliation with merchandise financial plans.
- Increased return on investment with weekly receipt flow visibility.
- A proactive approach towards business trends.

Process Steps

The high-level steps to complete this process:

- Planning Administration:
  - Planning Administration.
  - Currency Administration.
  - Validate Loaded Data.
- Planning Maintenance:
  - Location Clustering.
  - Assortment Period Maintenance.
  - Curve Maintenance.
- Assortment Planning:
  - Perform Last Year/Forecast/MFP Analysis.
  - Set targets and seed baseline data to provide the smart starting point.
  - Determine the total number (#) of options and the new and carryover split.
  - Create New Options, assign like-items and update attributes if required.
  - For all the options, the item selling start date defaults to season start week and the item selling end date defaults to season end week. Adjust the start and end week to a different week if required to create multiple flows within a season. This way, some options are planned for the first half of the season and some for the second half, or some options are planned to be sold during the peak of the season. This feature allows the retailers to bring variety and fresh style colors on the shop floors every few weeks in a season. This concept was previously handled by the creation of flows and assigning flows to options. The latest offering brings in more flexibility and simplifies the process flows.
  - Generate assortment recommendation by season and cluster leveraging AI Foundation algorithms.
  - Review Assortments by different attribute groupings.
  - Tweak Assortment Plan to optimize different KPIs or key in preferences like must-haves and other criteria as required by the business.
  - Check visual assortment across the assortment period for the chosen cluster.
  - Plan Buy quantity for the included options in the assortment.
  - Self-approve the targeted assortment.
- Item Planning - Basics:
  - Review targets from Assortment Planning and MFP to ensure that item plans will meet financial targets.

  - Override the life cycle Start Date and Lifecycle End date if required.
  - Plan Sales and Margin by item and Location Cluster.
  - Create a receipt and inventory plan by item and Location Cluster.
  - Reconcile to the Merchandise Financial Planning targets for the Basic only subclass or reconcile in the Item Planning workbook aggregating plans along with seasonal items.
  - Self-approve the item plan to the Op and Cp versions.
- Item Planning:
  - A single workflow is used to create both pre-season and in-season item plans to minimize redundant user actions.
  - The key differentiator between pre-season and in-season would be the assortment period/season chosen compared to the system date. Pre-season Assortment plans can be created by choosing a future season and in-season plans can be updated by choosing the current season.
  - Review targets from Assortment Planning, Forecast, and MFP.
  - Plan Sales and Margin by item and Location Cluster.
  - Create a receipt and inventory plan by item and Location Cluster.
  - In-season Item plan also provides the ability to reforecast sales for the remaining season to provide better guidance to the user to adjust to plans to meet emerging market trends.
  - Reconcile to the MFP targets.
  - Review and resolve real-time alerts.
  - Self-approve the item plan.

User Roles

Two user roles are provided.

Planner

The intended business user of Assortment Planning Cloud Service is an Assortment Planner. Some organizations may call this person a Buyer. The role is responsible for creating an assortment, along with sales and receipt plans, that meet the strategy and financial targets set by the retailer to meet holistic financial goals.

Once the Assortment Planning process is completed, the user can plan the execution of that assortment plan with a weekly sales and receipt plan by item and location cluster.

Planning Administrator

The Planning Administrator role performs periodic administrative steps that drive some of the critical parts of the Assortment and Item Planning process. Several tasks that must be completed by the Planning Administrator before the Assortment Planner may begin their tasks.

Key Concepts

The user should understand these key concepts from Oracle Retail Predictive Application Server Cloud Edition.

Placeholder Maintenance

Placeholder Maintenance enables you to dynamically create/modify/delete placeholder positions at chosen hierarchy levels, so you can plan for future expected items/locations without having them exist in the current system. As part of the system configuration, Placeholder Maintenance needs to be enabled for the needed dimensions and levels. It enables you to choose options **Use Like Item** and/or **Assign Attributes** for easy and quick creation of placeholder positions. You can also import placeholder items/attributes created externally using Microsoft Excel files. It is strongly recommended to assign a like-item as that like-item forecast provides a better baseline forecast for new items. It includes the following capabilities:

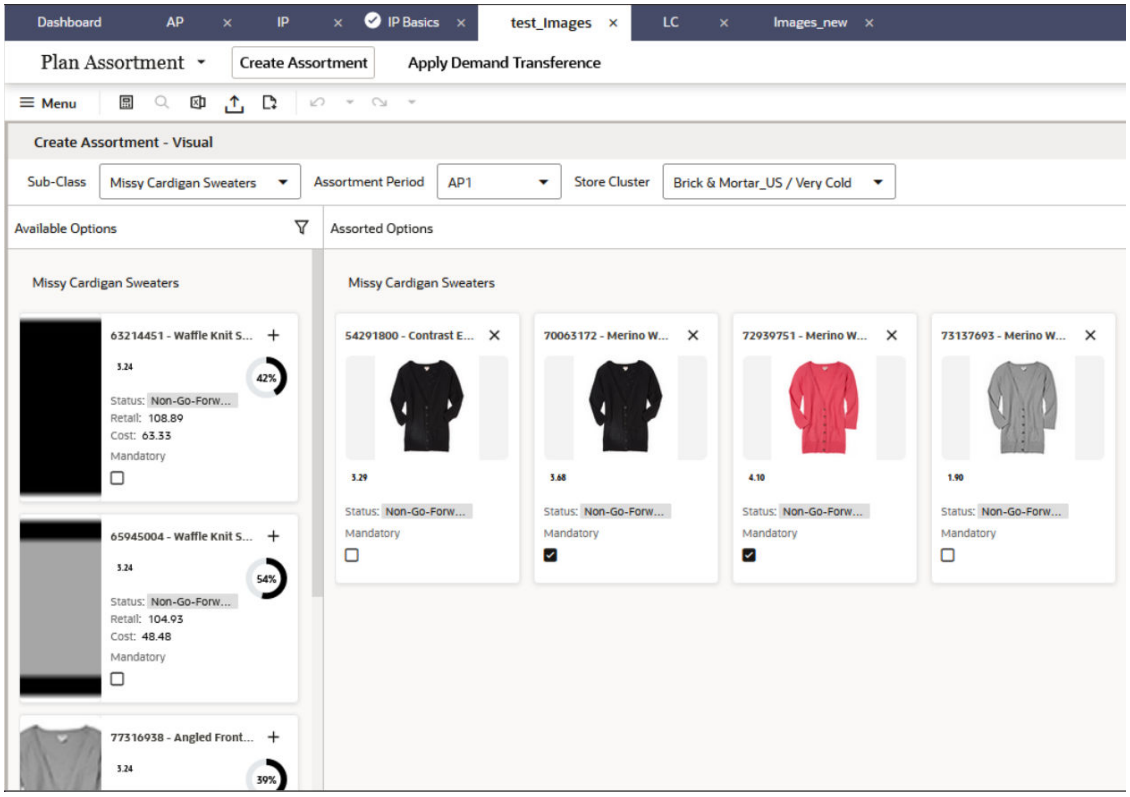
- Contextual launch for quick creation of placeholder positions that pre-select the launch context
- Launch from the main menu enables the quick ability to add placeholders at any of the enabled dimensions and levels
- Ability to copy attributes from selected like positions
- Modify enabled only when placeholder positions exist
- Deletion of unused placeholder positions with proper messaging
- Enhanced import of placeholders from Microsoft Excel

> **Note:**
>
> For additional information about Placeholder Maintenance, refer to the *Oracle Retail Predictive Application Server Cloud Edition User Guide*.

Visual Planning

Assortment Planning Cloud Service is highly visual, offering planners the ability to build and plan their assortments just like their customers shop their assortments, visually. Visual capabilities, when deployed using best practices, will not slow solution performance and can use your existing image storage solutions to reduce the total cost of ownership. Planners can view visually and add all the styles available in an assortment and summary pane while understanding the impact of each assortment choice that they have made.

Figure 1-1 Visual Planning Example



Visual planning includes the following capabilities:

- View images associated with each style-color and the configured measures and/or attributes data.
- All available style-colors listed in card view formatcan be added to the assorted list by dragging and dropping or by clicking on the plus/add icon (+).
- Quick summary pane for reviewing the assortment choices made against target and LY.
- Ability to move cards from assorted to available by dragging and dropping or by clicking on the close/delete icon (X) with all related summary metrics recalculated accordingly.
- Easy to edit configured measures.
- Dynamically switch between the measure profiles in the card view.
- Easy and quick attribute filtering, with the ability to filter up to five attributes at once.

Dynamic Rollup

With dynamic hierarchy, planners can dynamically rollup plans using the attributes defined on the product/location dimension. The workspace plan/dashboard dynamically rolls up instead of rebuilding it. This does not require refreshing the entire workspace or dashboard. It includes the following capabilities:

- Depends on the context of the workspace/dashboard and the selection of attributes.
- Support for placeholder positions created without values using the attribute value **unassigned**.

- In Workspace:
  - Ability to select up to three product/location attributes by specifying in the Define Product Rollup view.
  - Refresh the dynamic rollup and use the attributes throughout the workspace without having to rebuild the workspace.
  - Any view in Workspace dynamically rolls up to the needed attribute using the attribute values.
- In Dashboard:
  - Ability to select product/location attributes; rollup occurs for the attribute values so you can review dashboard metrics in the manner most relevant to your business.

Special Filters

The special filters enable the planner to focus on information that is important to them at that moment. It affects the visible positions of the workspace view by displaying only the data that is fulfilling the requested criteria while all other positions remain hidden. When a special filter is applied to a view, the positions in the query dimensions (X and Y axes) that fulfill the requirements of the query for the particular position of the driving dimension (Z axis) are the only ones shown in the view. It includes the following capabilities:

- Easy to use.
- Pre-configured.
- Quick visual identification when special filter is turned on.
- Easy and quick option to turn on/off.
- Attribute filtering.

Image Display

The ability to view images associated with specific positions and attributes is critical for planning. Image display is enabled for specific workspaces and dimensions through configuration. It includes the following capabilities:

- View an image associated with a chosen position/attribute.
- Scroll through images of positions visible on the grid without having to bring up image displays for each of those positions individually.
- Set a default image.
- Resize the image as needed.

Attribute Support

The ability to select the available attributes at different levels for display and sorting purposes, along with attribute images can help planners in making decisions easily and quickly. The dynamic rollup of attributes within workspaces and the Dashboard is also available along with the support of unassigned attributes for placeholder items. It includes the following capabilities:

- Select the needed attributes for display and sort along with supported attribute images at the needed hierarchy levels.
- Flexibility to change the display order of attributes as needed.
- Easy selection of the sort order.

- Quick option to hide/show the attributes in the Pivot Table using Manage Attributes.

Undo

With Undo, planners can quickly reverse their actions and undo the edited data for the selected cells or all changes performed after the last calculate operation. When more than one action is performed, all the performed actions are listed. Undo is performed sequentially. It includes the following capabilities:

- Operates on the entire workspace, not just the current view.
- Can be accessed from the Quick action toolbar, Quick action menu, or keyboard shortcut (CTRL+Z).
- The newest edits are at the top of the list and oldest are at the bottom.
- The planner can sequentially undo the actions from the top of the list either one by one or multiple/all at once.

Position Filtering

Position filtering enables the planner to quickly filter the data of a specific dimension that is important for them at that moment. It affects the visible positions of the worksheet view by displaying only the selected data slices. Position filtering can be applied to any of the views within the workspace. It includes the following capabilities:

- Easy and quick option to launch using the context menu.
- Hides all the other positions and shows only the filtered data.
- Quick visual identification when Position Filtering is turned on.
- Easy and quick option to remove a filter.

Attribute Filter in Wizard

The ability to filter positions is provided by the available attributes and their values within the wizard process while creating/reviewing the plan. With attribute filtering, planners can make decisions easily and quickly. It includes the following capabilities:

- Select the needed attribute for filtering, select the attribute value, and click search.
- Flexibility to change the filter on to another attribute as needed.
- Easy selection of the attribute and attribute value.
- Quick option to select hide/show on the filter result.

Real-Time Alerts

Real-time alerts allow the planner to manage by exception. When dealing with large amounts of data at the Item/Location level, it can be difficult to search for and find items/locations that are performing outside of expectations. Real-time alerts solve that issue by highlighting the most common issues and presenting them in an actionable format for the planner to resolve. Real-time alerts help to simplify business processes by focusing the planner's attention on prioritized, value-based activities. For the complete list of real-time alerts and their calculations, see Appendix: Additional Information.

Online Administration Tools (OAT)

Assortment Planning Cloud Service uses the Oracle Retail Predictive Application Server (RPAS) Online Administration Tools to facilitate data uploads, and as part of scheduling RPAS utilities and scripts that must be scheduled to run the batch on the Cloud. These tasks are typically done by an Administrator.

For more details about which data uploads and batches can be completed using the Online Administration Tools, see the *Oracle Retail Assortment Planning Cloud Service Administration Guide*.

Dashboard

The Dashboard allows the administrator to quickly analyze the health of the business. Assortment Planning Cloud Service uses the Admin Task Status Dashboard to show the status of the administrative task submitted; the Planning Weekly Trends (Key Items) dashboard shows the graphical view of high performing and low performing In-season metrics by calendar; the Product Trends (Key Items) shows the information of products sorted by the selected In-season metric for the Pre-Determined Calendar such as WTD, MTD, YTD, and so on; the Class Performance provides aggregated in-season metrics as the total value of all planned lines for the class level and higher; and the Exception Dashboard shows the exceptions for inventory count, immediate need count, future need count, sell thru count, and so on, for all items listed on the dashboard.

Data Requirements

The following data is required:

- Location hierarchy
- Product hierarchy
- Calendar hierarchy
- Product attributes and attribute values
- Location attributes and attribute values
- Merchandise Financial Planning Current Plan (MFP CP)
- Inventory Planning Optimization Cloud Service-Demand Forecasting
- Last Year data
- On Hand and Retail Price
- Sales Retail, Sales Units, and Cost
- Curve Library
- Price elasticity entered by the Administrator

Assortment Planning Versions

The following table lists the commonly used versions.

Version	Description
WP	Working Plan

Version	Description
OP	Original Plan
CP	Current Plan
LY	Last Year
TGT	Target

Base Intersection of Data

The following table lists the base intersection of data.

Hierarchy	Base Level
Product	Style-Color
Calendar	Assortment Period in Assortment Planning, Week in Item Planning
Location	Cluster for both Assortment and Item Planning Store for exceptional store level Item Planning

Forecasting

A forecast is a projection of future sales. It can be used for planning financials and inventory. The forecast is generated leveraging AI Foundation (AIF).

Different forecasting methods used are depending on the planned period, Pre-season and In-season. The forecast parameters need to be set in the AI Foundation control center once during implementation. The forecast engine generates forecast every day for various levels of product hierarchy and other parameters set. The different forecast methods used are described below.

Pre-season Forecasts

Pre-season forecasts are generated with the AutoES method which evaluates multiple forecast models to determine the optimal forecast method to use for a given set of data.

- Simple Exponential Smoothing
- Holt Exponential Smoothing
- Multiplicative Winters Exponential Smoothing
- Additive Winters Exponential Smoothing
- Seasonal Regression

The accuracy of each forecast and the complexity of the forecast model is evaluated to determine the most accurate forecast method.

In-season Forecasts

In-season forecasts are generated with the Bayesian Forecasting method.

- Bayesian forecasting

  Uses a sales plan as a starting point and then adjusts based on observed actual sales data. During pre-season, Forecasts may be seeded to Determine the # of Options and FP ROS Recommended within the Assortment Planning task at Assortment Period x Subclass

x Cluster. The forecasts will also drive the assortment recommendation. In the pre-season Item Planning task, Forecasts may seed sales at Assortment Period x Style-Color x Cluster. During In- Season Item Planning, Forecasts are displayed for comparison analysis as the user adjusts financial plans for trends at Assortment Period x Style-Color x Cluster.

2
AP Cloud Service Dashboard

The Dashboard is a graphical user interface that provides an at-glance view of Key performance indicators of a business. As soon as you log in to the application, you are welcomed by the dashboard that briefs you about the health of the business, KPIs, and key items for each product category. The dashboard provides key statistics at your fingertips. You can use the dashboard to quickly analyze the health of the business, make note of your top-ranked and low-ranked items, review any alerts, and launch the affected workbooks directly to investigate the alert scenarios and resolve the alerts.

Different KPIs are important for different planners and are based on the product you are working on. If planner A wants to review trends by Gross Margin, planner B would want to review trends by Sell Thru and so on. Hence, the flexibility to select the required metrics is given to you before your online day ends so that the overnight batch picks up the parameters set to realign the dashboard to begin the next online day.

You are expected to set the KPIs to review the dashboard in the Assortment Services->Planning Services-> Dashboard Parameters view.

The dashboard is laid out in three sections:

- Tiles
- Charts
- Recent Plans

Tiles

Tiles are displayed across the top of the screen and contain the measures/metric data. Located above the tiles, drop-down lists control the profile of tiles and segment of data represented in the tiles and the following chart.

The arrow beneath a tile indicates what is displayed in the chart area in more detail. Clicking on a different tile will refresh the data in the chart area below and put the arrow under the clicked tile.

There are various styles of tiles-variance and informational:

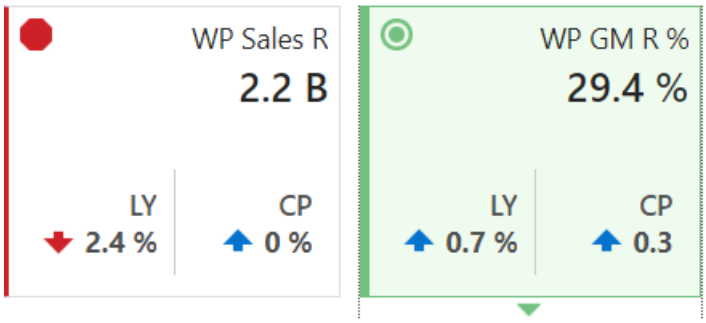
- Variance

  A variance tile shows the divergence of value between one metric with two other related metrics.

- Informational

  An informational tile displays the existing measure data.

Figure 2-1 Variance Tiles



The color and icon of a tile give a visual indicator of the state or health of the metrics in the tile. In Figure 2–1, WP Sales R displays a problem icon (red octagon) because the working plan sales value is 2.4% below Last Year sales. An informational tile is always blue indicating no problem, because it is simply showing data, not a comparison.

Adding a New Tile

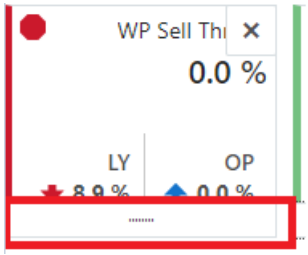
To add a new tile from a predefined pool, click **Add** on the right-hand side of the tile carousel (some scrolling may be required). This brings up a dialog showing all the available metric tiles. Select the desired tile and then click **Ok**. The tile is added to the tile carousel.

Figure 2-2 Add New Measure Tile

Changing the Tile Order

To change the order in which tiles are displayed, click **Edit Dashboard** . Each tile now shows a drag bar at the bottom of the tile. Drag the tile to the place you want it on the carousel and drop it.

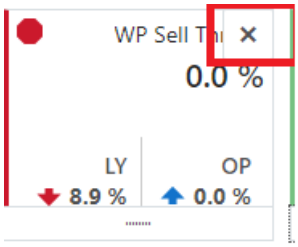
Figure 2-3 Change Tile Order



Removing a Tile

Each tile now shows a delete button in the upper right corner. To remove a tile, click **Delete**. The tile is removed and placed back into the list of available tiles.

Figure 2-4 Removing a Measure Tile



Charts

Selecting a tile displays detailed information in the chart area for the measures contained in the tile. The information is presented with time on the horizontal axis and the measure value on the vertical axis.

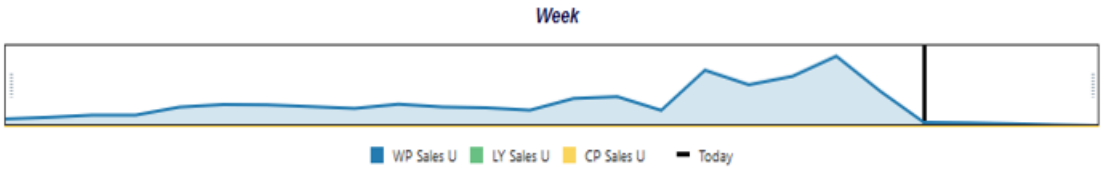
The drop-down lists, displayed above the tiles, control the profile of tiles and segment of data represented in the tiles and, therefore, the chart area.

The arrow beneath a tile indicates what is displayed in the chart area in more detail. Clicking a different tile refreshes the data in the chart area below and puts the arrow under the clicked tile.

Time Horizon and Scale

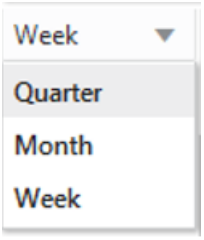
The time horizon used to calculate the metric of each tile can be changed either in the drop-down list selection above the tiles or by dragging the time horizon window at the bottom of the chart.

Figure 2-5 Time Horizon Window



The scale of the horizontal axis (the calendar) can drastically change the shape of the data. You can change the scale of the chart to get more detail or to smooth fluctuations and more easily spot trends. To do this, select the time scale from the drop-down list at the top right corner of the chart.

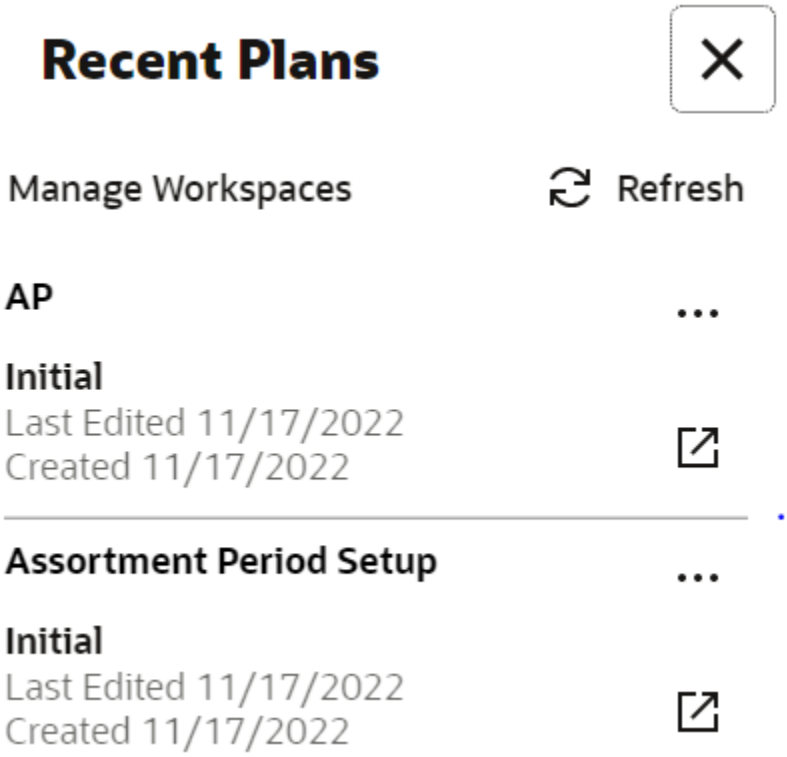
Figure 2-6 Time Scale



Recent Plans

Recent Plans is a list of the most recently built plan segments. Choose a segment from the Recent Plan section in the top right of the screen to open the workspace without having to rebuild the segment using the selection wizards. Click **Refresh** to update the list with the most recent plans.

Figure 2-7 Recent Plans



Dashboard Parameters View

The Dashboard Parameters view is used to predefine the KPIs for which you would want to see the item trends. Currently, you can set a minimum of one and a maximum of two KPIs to watch the item trends. You can also specify the number of items in each subclass to watch the trend for. This value is defaulted to 10. You can also specify the calendar period for which they want to view the trends. It can be WTD, MTD, YTD, and so on.

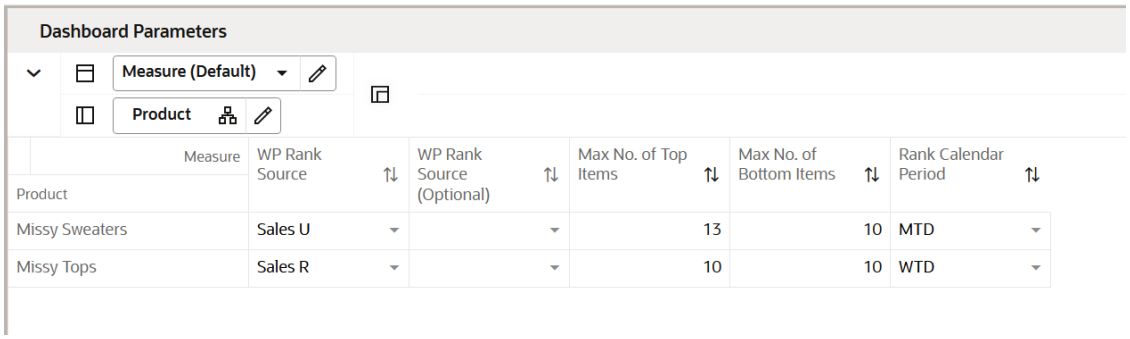
The application uses the parameters defined here in the nightly batch and keeps the dashboard ready for you as soon as you log in to the application.

The user can set these parameters before logging off for the day to be able to review the latest trends based on the KPIs set in this view the next online day.

The steps to complete this process:

- Select the KPI to watch the item trends at the class level and higher.
- Set the maximum number of top-performing items and low-performing items to view the trends for each.
- Set the Calendar period to view the ranks in the Product Trends (Key items) Dashboard.

Figure 2-8 Dashboard Parameters View



Measure Table

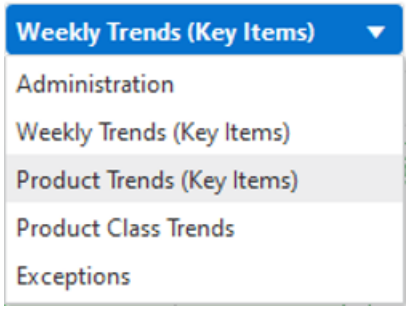
Table 2-1 Dashboard Parameters View Measures

Label	Definition
Wp Rank Source	KPI that needs to be considered while watching trends for the chosen product hierarchy.
Wp Rank Source (Optional)	The second KPI needs to be considered to watch the trends for the chosen product hierarchy. It is an optional value.
Max No. of Top Items	The number of top-performing items to see on the dashboard while watching trends.
Max No. of Bottom Items	The number of low-performing items you want to see on the dashboard to watch the trends.
Rank Calendar Period	Calendar Period to be used in the Product Trends (Key Items) Dashboard to review the item trends.

Dashboard Profiles

The dashboard also contains a list of dashboard profiles. A dashboard profile groups the metrics, or Key Performance Indicators (KPIs), specific to a business role and business purpose.

Figure 2-9 Dashboard Profiles in AP Cloud Service



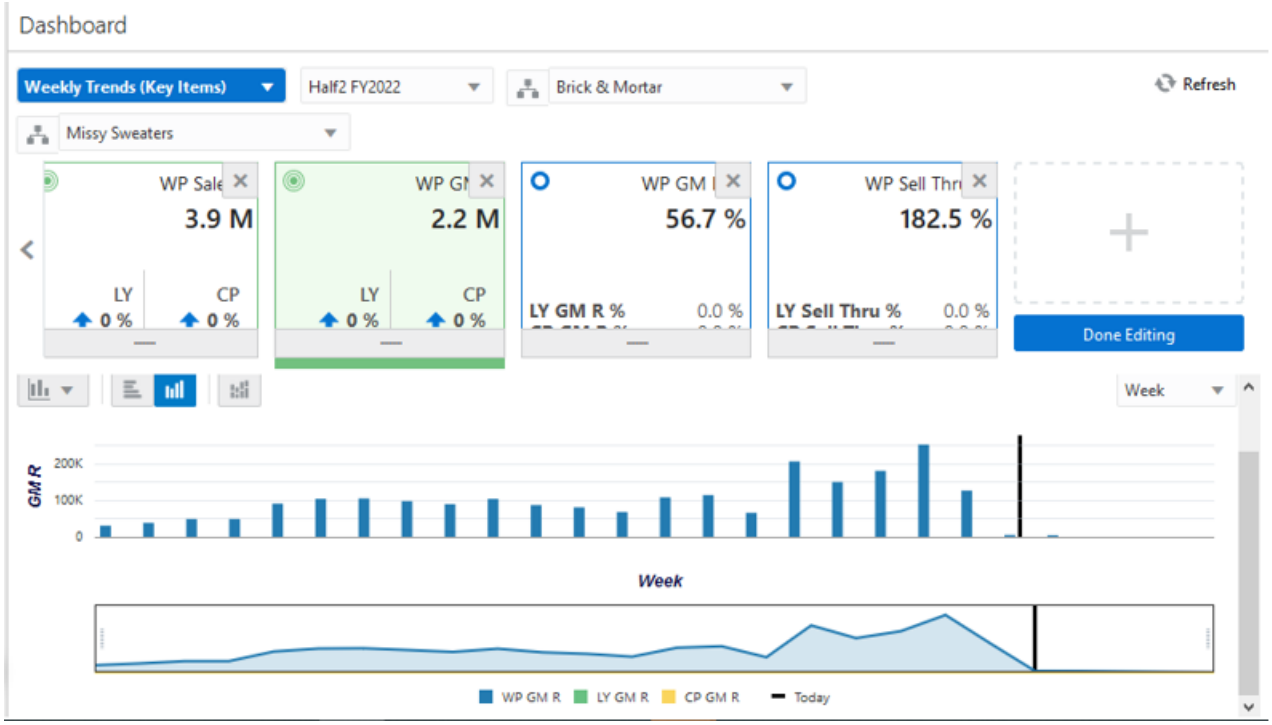
Administrator Dashboard

The administrator dashboard profile is common to all RPAS Cloud Edition applications.

Weekly Trends (Key Items) Dashboard

The Weekly Trends for Key Items shows the graphical view of the key In-season metrics by calendar. It lists the high performing and low performing *n* (number of items) where the number of items for each subclass is a configurable value with an upper limit. The trends are shown for pre-determined metrics Sales U/R, Gross Margin, Gross Margin %, and Sell Thru %.

Figure 2-10 Weekly Trends (Key Items) Dashboard

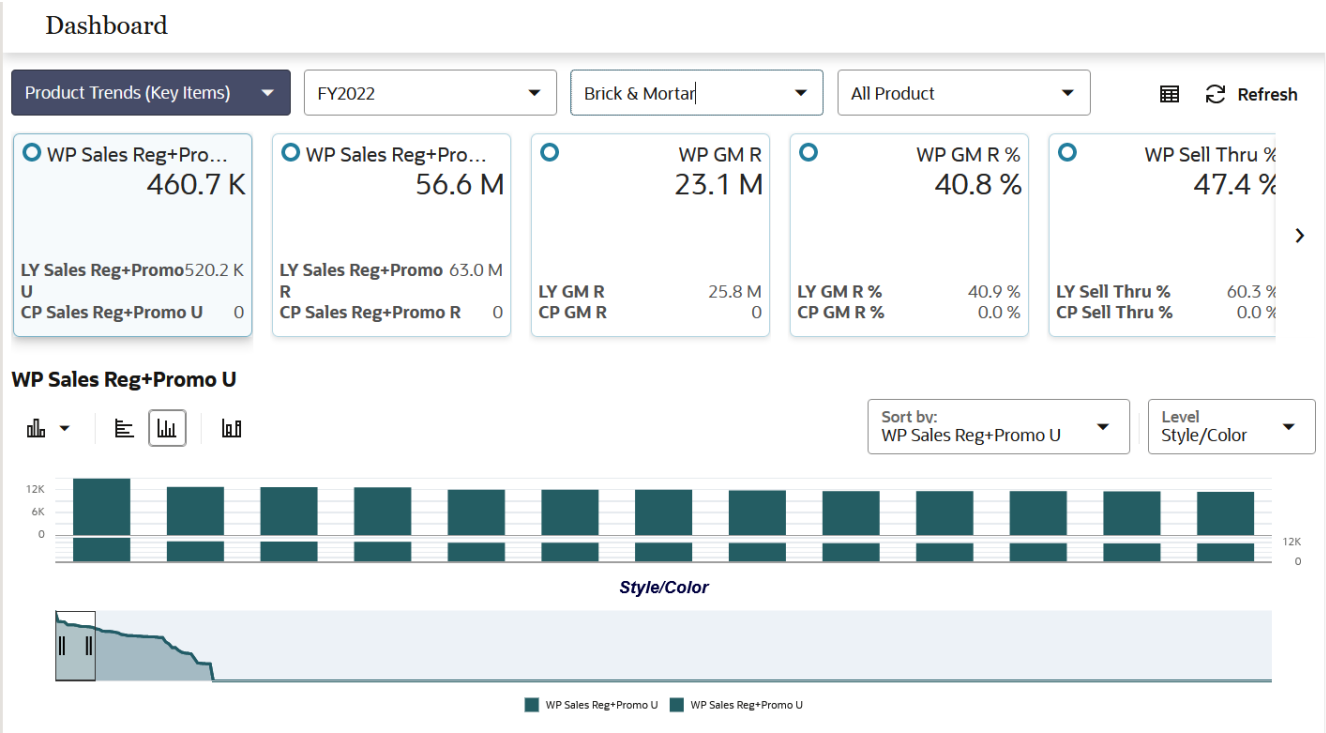


Product Trends (Key Items) Dashboard

The Product Trends (Key Items) Dashboard is an In-season dashboard that shows the information of products sorted by the selected metric for the pre-determined calendar period. You can review the item ranks for the *n* number of items for any of the Week to Date, Month to

Date, and Year to Date metrics. The number of items to be viewed on the dashboard is a configurable value.

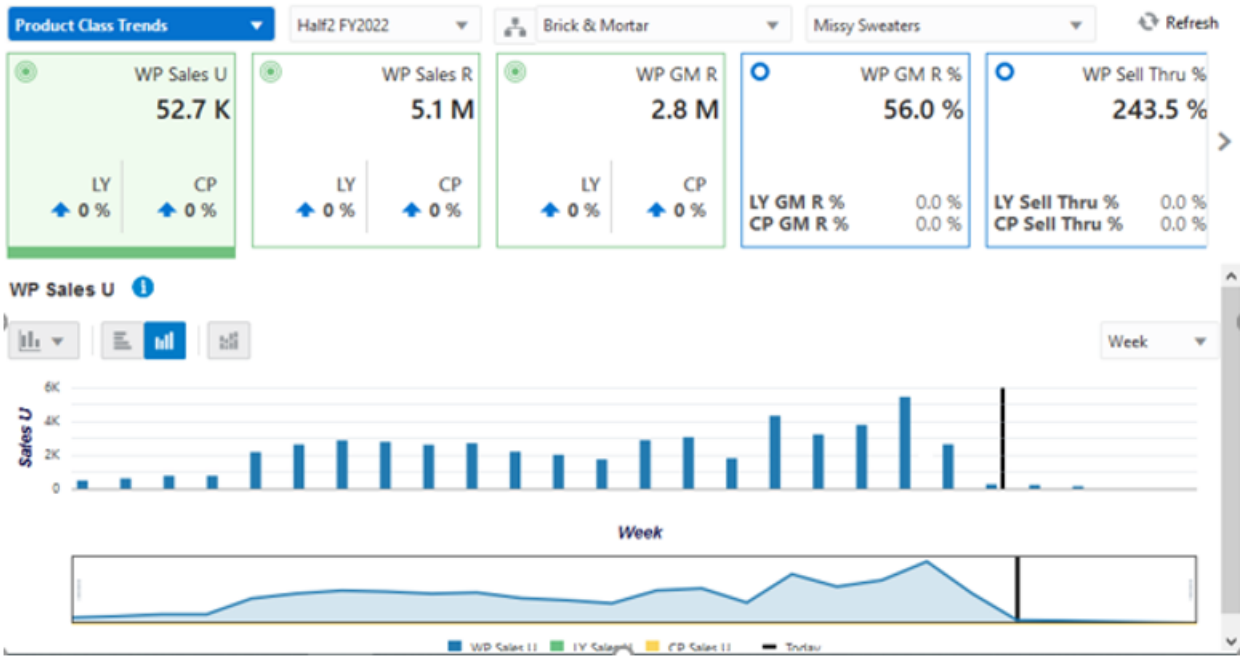
Figure 2-11 Product Trends (Key Items) Dashboard



Product Class Trends

The Product Class Trends Dashboard is an In-season dashboard that provides true total value of class. This view enables you to review the true performance of the products at the class level and higher. The metrics provided here are Sell Thru %, Gross Margin, and Sales U/R along with the respective periods, locations, and products.

Figure 2-12 Product Class Trends Dashboard

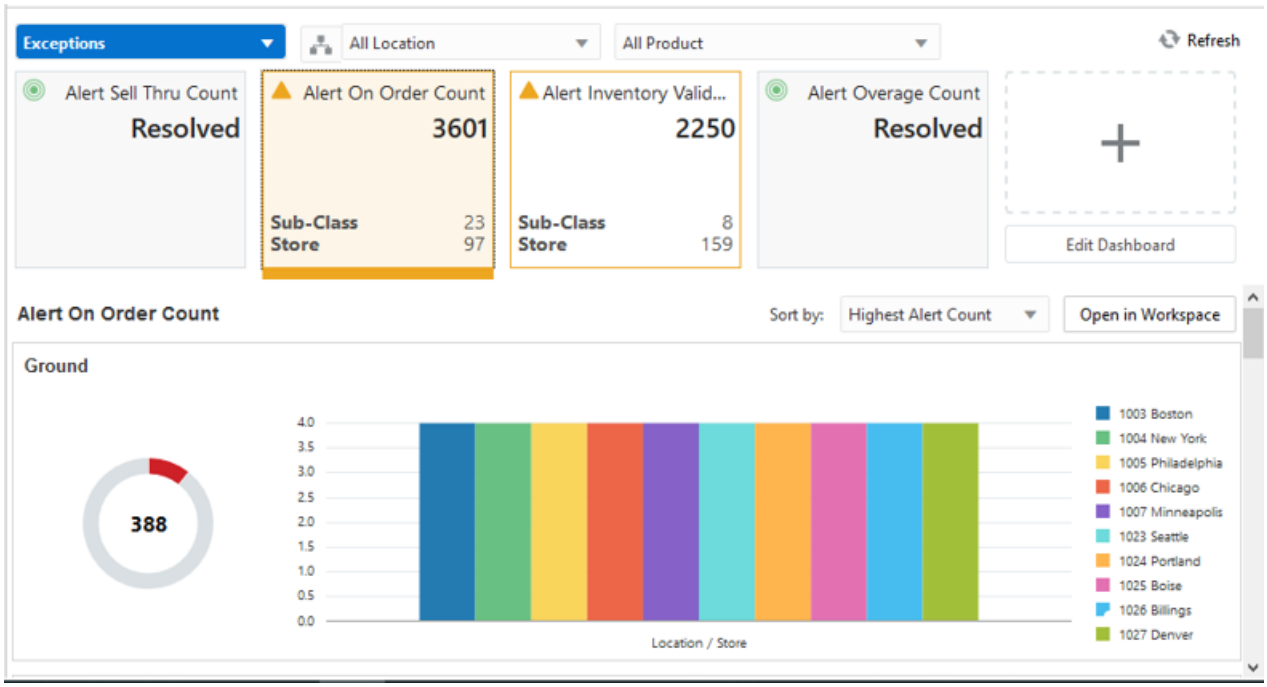


Exception Dashboards

The Exception Dashboard shows the exceptions if any, for the High and Low performing items listed in the dashboard. Alerts are provided for various business conditions. The alert hit counts are broken down by product and location. Charts are displayed below a chosen alert for the top five alerted products (either departments or subclasses). This helps you understand what your working priorities should be. The Exception Dashboard shows the exceptions for inventory count, immediate need count, future need count, sell-thru count, and so on.

Click **Open in Workspace** to open a plan and start the alert navigation mode within the workspace. This brings you to the first alerted position and views that are associated with the alerted measure.

Figure 2-13 Exception Dashboard



3
Planning Administration

The Planning Administration task is used to map last year weeks to current year weeks, set up product and location attributes, assign strategy weights for location clustering, define size profiles, map stores to warehouse, set/view imported data for Demand Transference (DT) from AI Foundation, set Dashboard parameters, and export setup.

Typical Business Users

The typical user of the Planning Administration task is an Administrator who has business knowledge of last year weekly mapping, product and location attributes, cluster strategy weights, Demand Transference data, and Dashboard parameters.

Data Requirements

The following are the data requirements for this task:

- Weekly holiday shifts and how they correspond from last year to this year
- Item attributes for placeholder items
- Location attributes for new locations
- Location Cluster Strategy Weights
- Assortment Elasticity and Attribute Weights for DT

Create the Planning Administration Segment

To create the Planning Administration segment:

1. Click **Assortment Services** in the Task menu. Then, click the Planning Administration activity and then the Planning Administration task.
2. The dialog to create New Plan opens. Click **Create New Plan**.
3. Enter a descriptive Plan Label in the text field. Click **Ok**.
4. In Select Product, select one or multiple departments and click **Finish**.

   The Planning Administration segment is built.

Step 1: Week Mapping

The Week Mapping step is used to assign and validate last year's weekly mapping. By default, a loaded file maps last year's weeks on a one-to-one basis. Situations that may require a weekly mapping shift are 53 week years and major holidays that change by weeks and/or months every year. Shifting a holiday week using mapping allows the business to compare last year’s holiday sales that may have happened in a different fiscal week to the week that they will occur in this year.

The step to complete this process:

- Confirm and modify if necessary, the week mapping.

Tab and View in this Step:

- **Week Mapping Tab:**
  - Week Mapping View

Week Mapping Tab

This tab is used to review and update the week mapping of this year to last year's weeks.

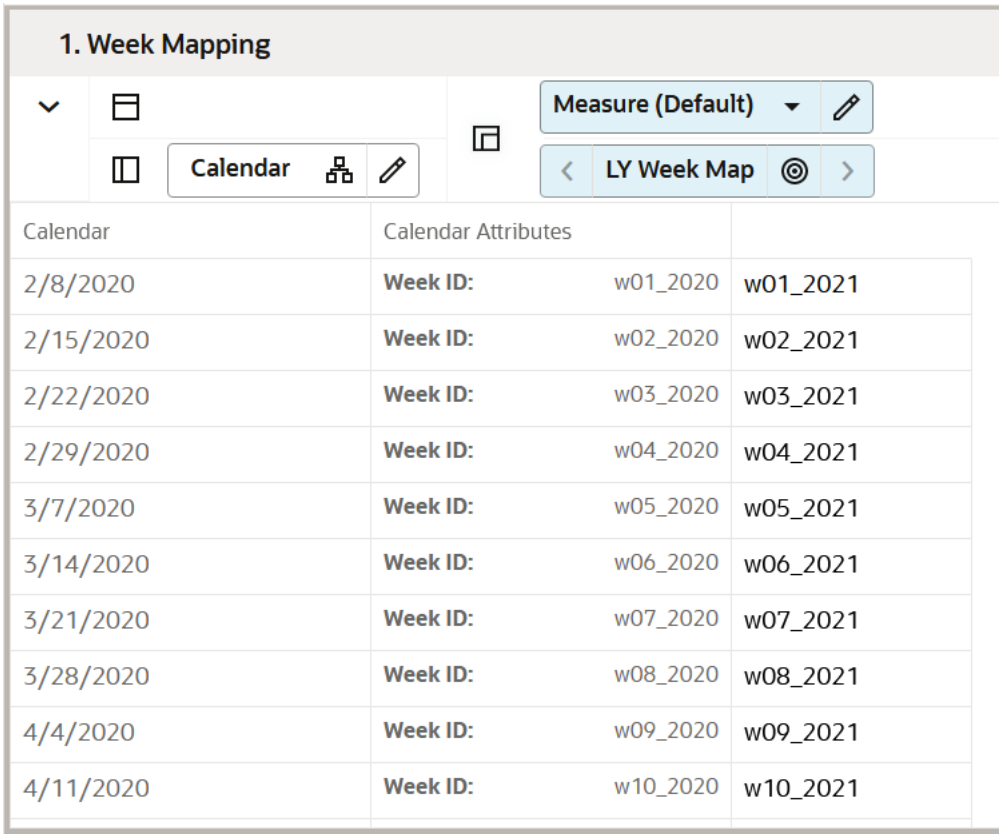
Week Mapping View

The Week Mapping view is used to map a week in this year to a week in last year. By default, the loaded file maps last year's weeks congruently to this year's weeks, meaning, the first week of last year is mapped to the first week of this year, the second week of last year is mapped to the second week of this year, and so on. The mapping for any week can be reassigned in this segment.

The step to complete this process:

- Enter this year's week that should map back to last year.

Figure 3-1 Week Mapping View



Measure Table

Table 3-1 Week Mapping View Measures

Label	Definition
LY Week Map	Measure to map this year's weeks to last year's weeks.
Week ID	Week position measure used to indicate last year's week number.

Step 2: Product Setup

The Product Setup step is used to view and define attribute values, assign the attributes to each category, and assign the attribute value for each item. The Administrator can map the product attributes, set the Dashboard parameters, set the card view attribute and images, and set the base unit price/cost of the placeholder products.

The steps to complete this process:

- View category attributes and attribute values.
- Create new attribute values, if necessary.
- Assign attributes to a category, which will be visible in the Assortment Planning segments.

  If an attribute is not assigned to a category, the attribute will not be visible in the Assortment Planning segments.
- Assign attribute values to placeholder items.
- Define the attribute image.
- Set the base unit price/cost for the placeholder items.
- Set the Dashboard parameters to see the item trends on the Dashboard based on the selected KPI.

Tab and Views in this Step:

- **Product Setup Tab:**
  - Define Product Attributes View
  - Select Product Attributes View
  - Assign Product Attribute View
  - Color Attribute Identifier View
  - Define Card View Attribute View
  - Define Attribute Image View
  - Base Unit/Price Cost View

Product Setup Tab

This tab is used to select and set up attributes of a product.

Define Product Attributes View

The Define Product Attributes view is used to view attributes and attribute values that can be used to distinguish items in an assortment based on the features. Example attributes are brand, size, product type, and color which can be used to facilitate planning, measuring, and efficiently managing a category's business. It also allows the creation of new attribute values.

To add a new attribute value, right-click a Product Attribute Value position and use the Add Positions option (Placeholder Maintenance functionality) to maintain new product attribute values (attribute value) mapping to a product attribute name (attribute name).

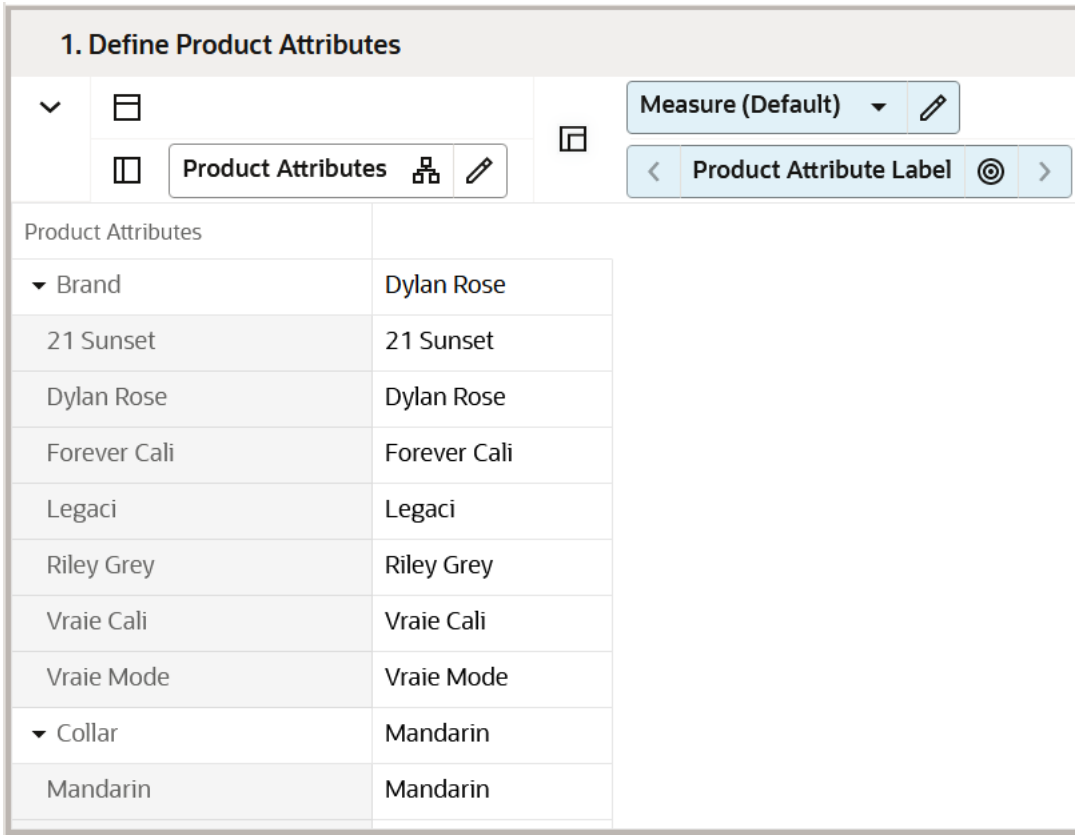
If attributes need to be updated for an existing item, the best practice is to update them in the source system.

For information on what is exported using the OAT process, see the *Oracle Retail Assortment Planning Cloud Service Implementation Guide*.

The steps to complete this process:

- View the existing attributes and attribute values.
- Use Placeholder Maintenance to create new attribute values, if necessary.

Figure 3-2 Define Product Attributes View



Measure Table

Table 3-2 Define Product Attributes View Measure

Label	Definition
Product Attribute Label	Used to store the product attribute values for a specific attribute.

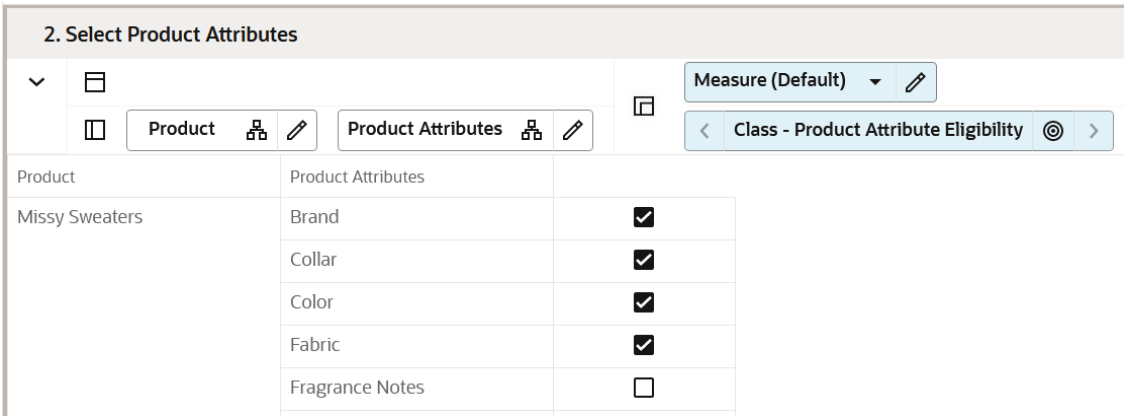
Select Product Attributes View

The Select Product Attributes view is used to maintain the mapping of attribute names to a product category. Depending on the settings selected, different attributes and their respective attribute values are made available to different product categories for attribute value modification. For example, an attribute Sleeve length may apply to the Sweaters product category, but may not apply to the Trousers product category.

The step to complete this process:

- For each category, use the Class - Product Attribute Eligibility Boolean flag to assign the appropriate attributes that should be visible in the Assortment Planning segment.

Figure 3-3 Select Product Attributes View



Measure Table

Table 3-3 Select Product Attributes View Measure

Label	Definition
Class - Product Attribute Eligibility	Enables the mapping of attribute names to a Class. Enabled attributes will be visible to a planner in Assortment Planning segments.

Assign Product Attribute View

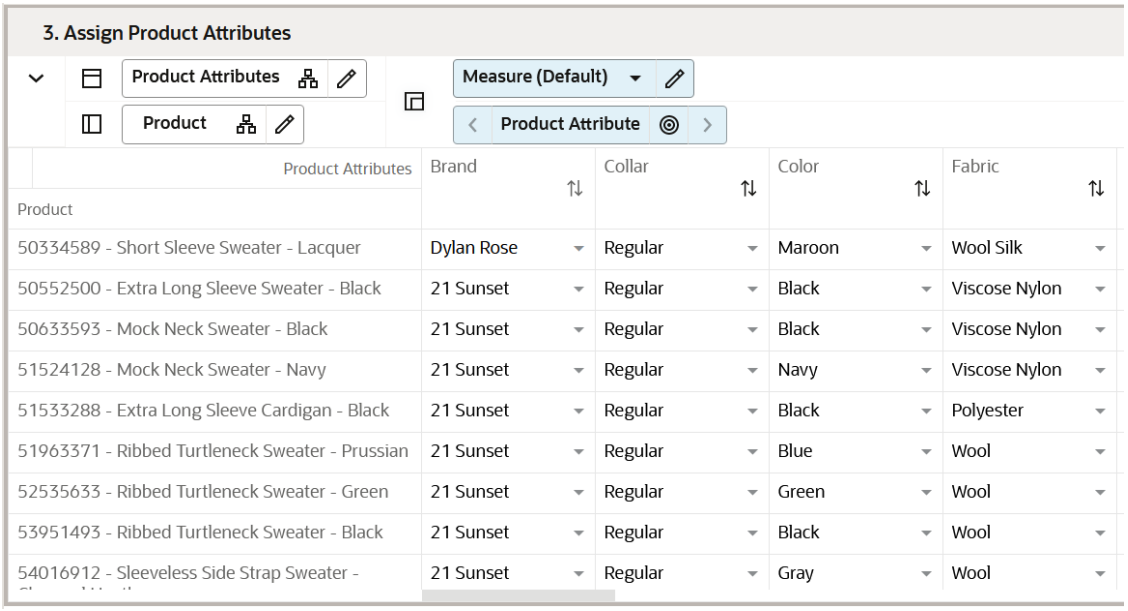
The Assign Product Attributes view is used to update the attribute values mapping to a placeholder item. While the Administrator is allowed to make changes to an existing item's attributes in this view, those changes will not be sent back to a master data management (MDM) system such as the Oracle Retail Merchandising System (RMS), which is the system of record for product attribute information.

If a change is made to an existing item here, it will need to be communicated back to the source system. A new Product attribute of Product Type is added to the current list of attributes that will mark an item as a basic/continuous item or a seasonal item to enable you to follow a simplified workflow for basic items and focus more on seasonal items every assortment period.

The step to complete this process:

- For placeholder items, assign the appropriate attribute values.

Figure 3-4 Assign Product Attributes View



Measure Table

Table 3-4 Assign Product Attributes View Measure

Label	Definition
Product Attribute	Drop-down list measure that enables the mapping of style-color attribute values to a style-color.

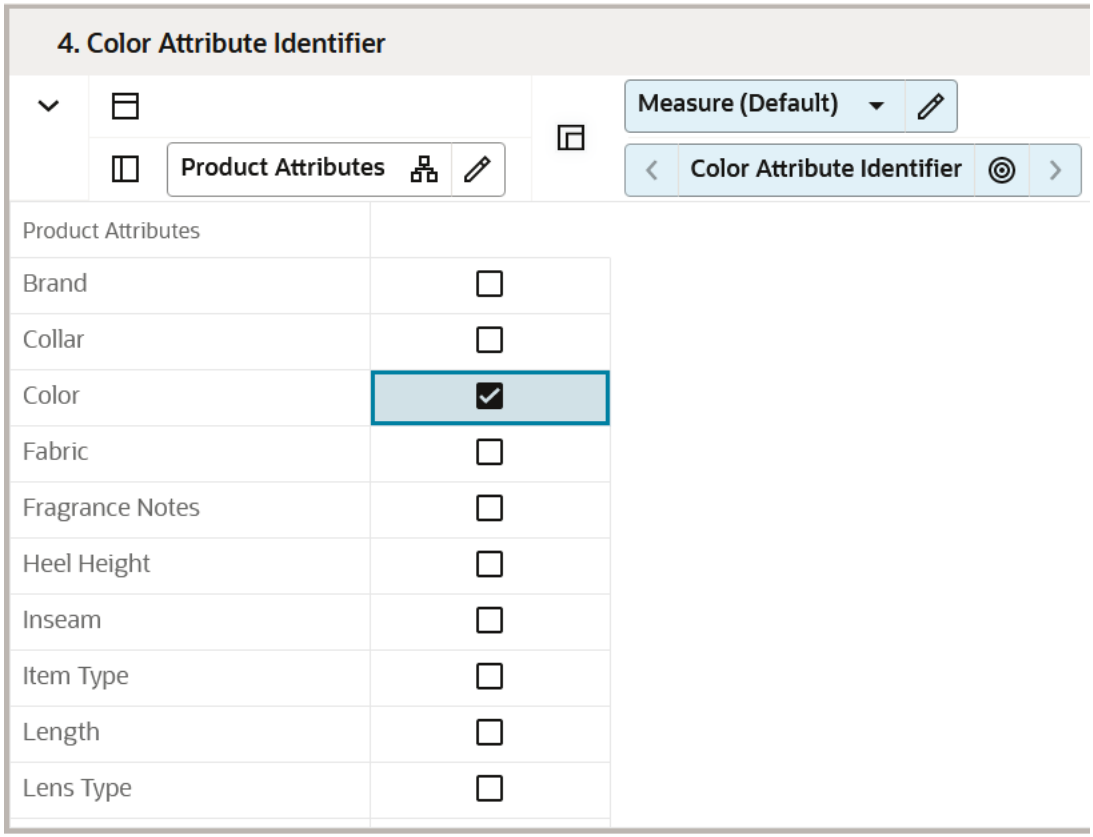
Color Attribute Identifier View

The Color Attribute Identifier view is used to validate the mapping of Color Attributes to the respective measures.

The step to complete this process:

- Validate the mapping of the Color Attribute to the respective measure.

Figure 3-5 Color Attribute Identifier View



Measure Table

Table 3-5 Color Attribute Identifier View Measure

Label	Definition
Color Attribute Identifier	Drop-down list measure that enables the mapping of the color attribute to the product attribute. The flag is used for exporting to Allocation as color for the item.

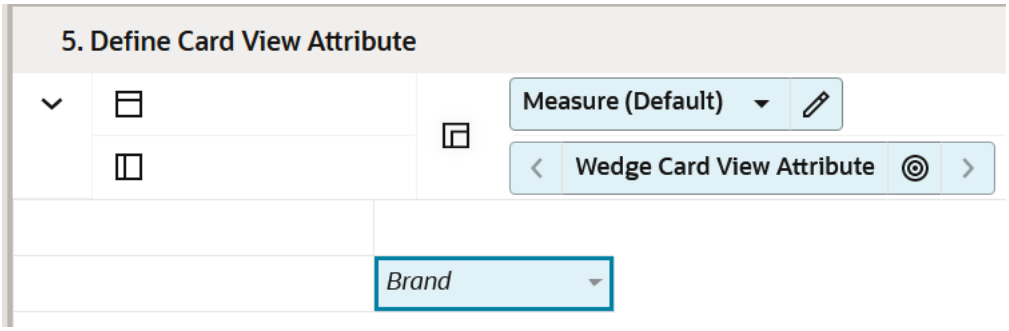
Define Card View Attribute View

The Define Card View Attribute view is used to define the specific attribute that needs to be used in the Assorted Card view that displays in the Plan Assortment - Visual view of the Recommend Assortment step of the Recommend Assortment Workspace. Also, the Planning Administrator can specify the attribute to be used in the Available Options view that displays in the Assorted Options- Visual view of the Plan Assortment step of the Assortment Planning workspace.

The step to complete this process:

- For Card Views, specify the attribute to be used.

Figure 3-6 Define Card View Attribute View

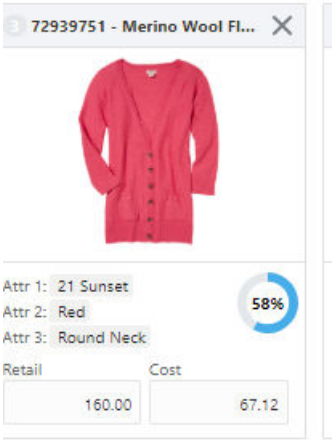


Measure Table

Table 3-6 Define Card View Attribute View Measures

Label	Definition
Wedge Card View Attribute	Drop-down list measure that enables the mapping of product attribute to use in the visual planning card view for Wedge.
Shopping List Card View Attribute	Drop-down list measure that enables the mapping of product attribute to use in the visual planning card view for the Assorted options.

Figure 3-7 Example of Shopping List Card View Attribute



Define Attribute Image View

The Define Attributes Image view is used to assign the image for Product Attributes.

The step to complete this process:

- Validate the mapping of the image to the Product Attribute.

For additional information on managing images, see the *View and Manage Images* section in the *Oracle Retail Predictive Application Server Cloud Edition User Guide*.

Measure Table

Table 3-7 Define Attribute Image View Measure

Label	Definition
Product Attribute Image	Used to enable the mapping of a product attribute image to the product attribute.

Base Unit/Price Cost View

The Base Unit Price/Cost view is used to set the price and cost of placeholder items.

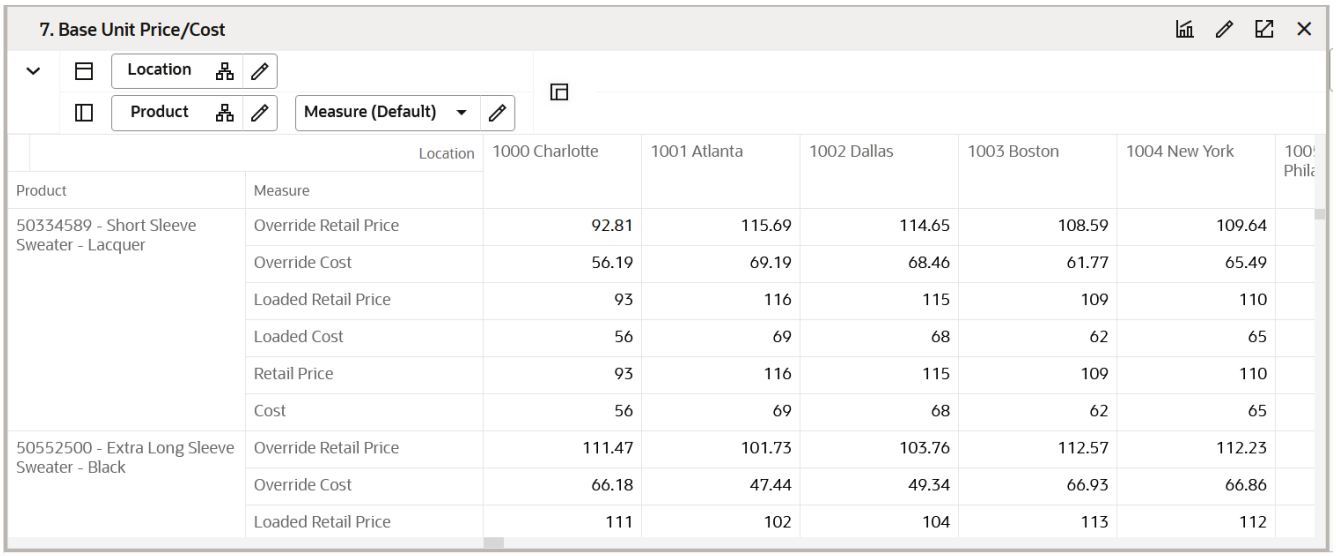
If all locations have the same retail and cost for the placeholder item, rollup the location hierarchy to All Locations.

While the Planning Administrator is allowed to make changes to an existing item's unit retail price or cost in this view, those changes will not be sent back to a Master Data Management (MDM) system such as the Oracle Retail Merchandise Financial Planning Cloud Service (RMFCS), which is the system of record for product pricing information. If a change is made to an existing item here, it will need to be communicated back to the source system.

The step to complete this process:

- Locate the placeholder items and enter the base retail and cost.

Figure 3-8 Base Unit/Price Cost View



Product	Measure	1000 Charlotte	1001 Atlanta	1002 Dallas	1003 Boston	1004 New York	100 Phila
50334589 - Short Sleeve Sweater - Lacquer	Override Retail Price	92.81	115.69	114.65	108.59	109.64	
	Override Cost	56.19	69.19	68.46	61.77	65.49	
	Loaded Retail Price	93	116	115	109	110	
	Loaded Cost	56	69	68	62	65	
	Retail Price	93	116	115	109	110	
	Cost	56	69	68	62	65	
50552500 - Extra Long Sleeve Sweater - Black	Override Retail Price	111.47	101.73	103.76	112.57	112.23	
	Override Cost	66.18	47.44	49.34	66.93	66.86	
	Loaded Retail Price	111	102	104	113	112	

Measure Table

Table 3-8 Base Unit/Price Cost View Measures

Label	Definition
Base Unit Price	An item's retail value, which can be set by location, should only be adjusted for placeholder items in this view.
Base Unit Cost	An item's cost value, which can be set by location, should only be adjusted for placeholder items in this view.

Step 3: Location Setup

The Location Setup step is used to view and define location attribute values, assign the values to each location, enable active locations for use in segments, assign Like Locations, enter space information for each location, define fixture capacity, assign fixtures to location, define size profiles, set location cluster strategies, and map warehouses to stores.

The steps to complete this process:

- View location attributes and attribute values.
- Assign location attribute values to stores.
- Enable or disable a location's active status.
- Assign Like Locations.
- Define size profiles.
- Set up Cluster Strategy weights.
- Map warehouses to stores.

Tabs and Views in this Step:

- **Attribute Setup Tab:**
  - Define Location Attributes View
  - Assign Location Attributes View
- **Location Strategy Tab:**
  - Define Location Info View
  - Department Location Exclusion
  - Cluster Strategy Weight Setup View
  - Warehouse Mapping View

Attribute Setup Tab

This tab is used to view and assign the location attributes and their values.

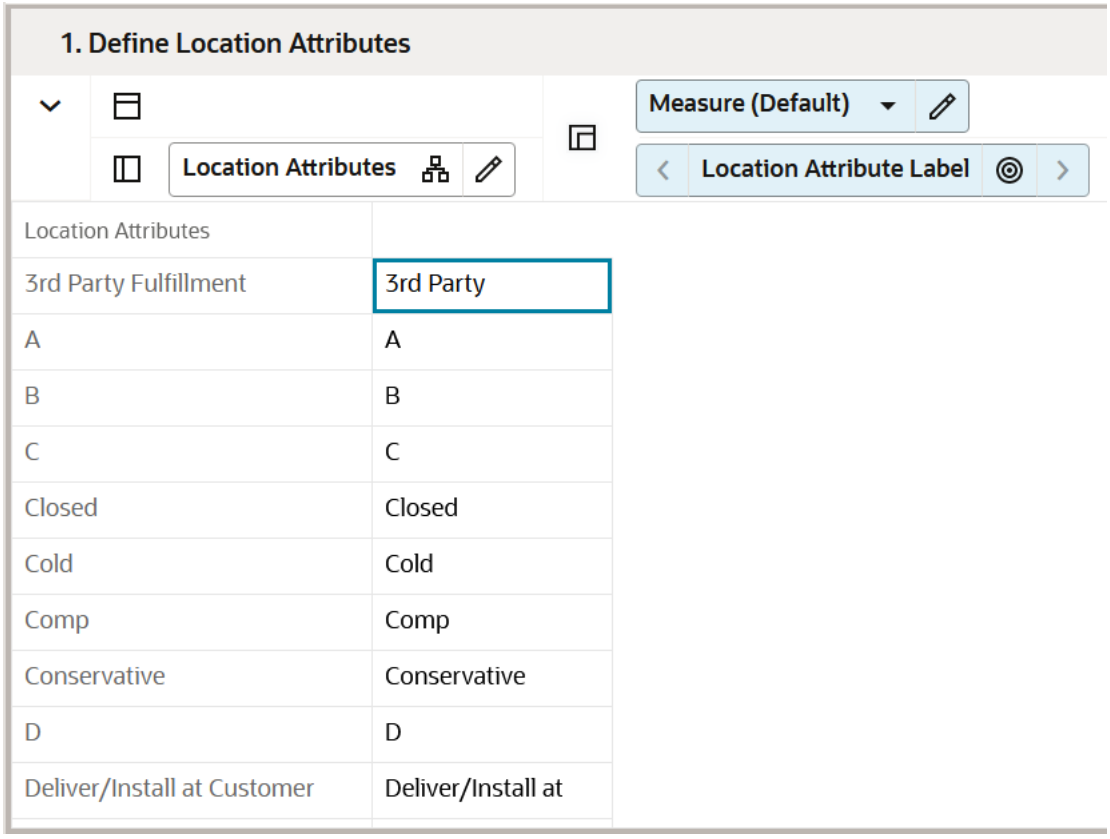
Define Location Attributes View

The Define Location Attributes view is used to view location attributes and their values that can be used to distinguish and group locations for clustering purposes.

The step to complete this process:

- View the current location attributes.

Figure 3-9 Define Location Attributes View



Measure Table

Table 3-9 Define Location Attributes View Measure

Label	Definition
Location Attribute Label	Used to store the location attribute label for a specific attribute.

Assign Location Attributes View

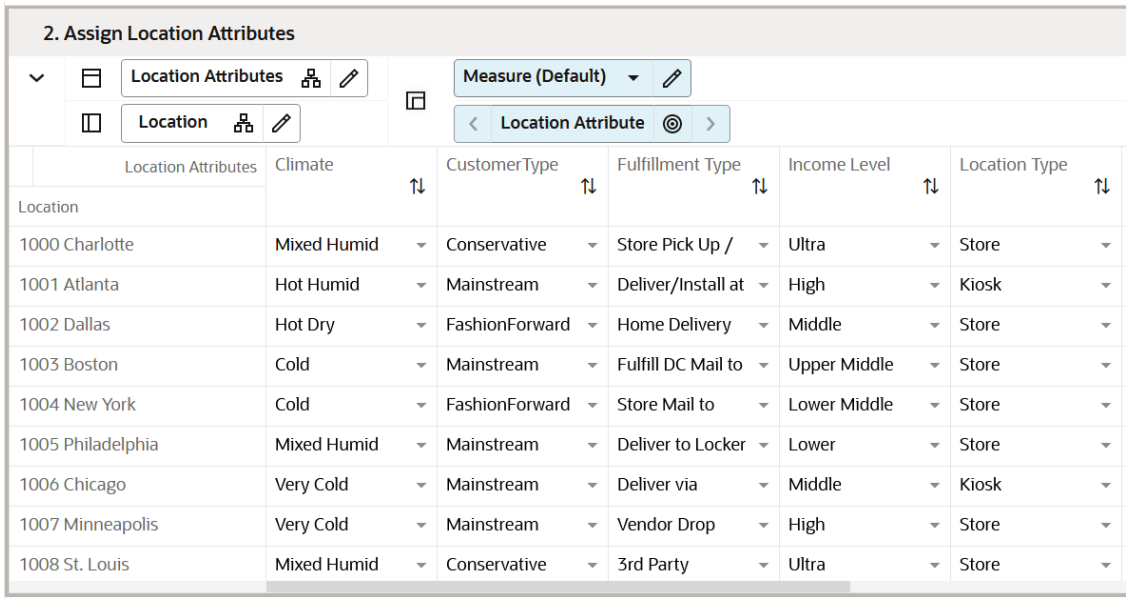
The Assign Location Attributes view is used to maintain the mapping of attribute values to a store. The location attributes are available to you in the Location Clustering segment.

While the Administrator is allowed to make changes to an existing attribute in this view, those changes will not be sent back to a master data management (MDM) system such as Oracle Retail Merchandising System (RMS), which is the system of record for location attribute information. If a change is made to an existing location here, it needs to be communicated back to the source system.

The step to complete this process:

- Use the Location Attribute drop-down lists for each attribute to assign the appropriate attribute values to each store.

Figure 3-10 Assign Location Attributes View



Location Attributes / Location	Climate	CustomerType	Fulfillment Type	Income Level	Location Type
1000 Charlotte	Mixed Humid	Conservative	Store Pick Up /	Ultra	Store
1001 Atlanta	Hot Humid	Mainstream	Deliver/Install at	High	Kiosk
1002 Dallas	Hot Dry	FashionForward	Home Delivery	Middle	Store
1003 Boston	Cold	Mainstream	Fulfill DC Mail to	Upper Middle	Store
1004 New York	Cold	FashionForward	Store Mail to	Lower Middle	Store
1005 Philadelphia	Mixed Humid	Mainstream	Deliver to Locker	Lower	Store
1006 Chicago	Very Cold	Mainstream	Deliver via	Middle	Kiosk
1007 Minneapolis	Very Cold	Mainstream	Vendor Drop	High	Store
1008 St. Louis	Mixed Humid	Conservative	3rd Party	Ultra	Store

Measure Table

Table 3-10 Assign Location Attributes View Measure

Label	Definition
Location Attribute	Drop-down list measure that enables the mapping of location attribute values to a location.

Location Strategy Tab

This tab is used to enter location information, define size profiles, cluster strategy weight setup, and warehouse mappings to locations.

Define Location Info View

The Define Location Info view is used to enter location descriptions, enable active locations and disable inactive locations, and assign like locations to new locations.

The steps to complete this process:

- Optionally, enter a location description.

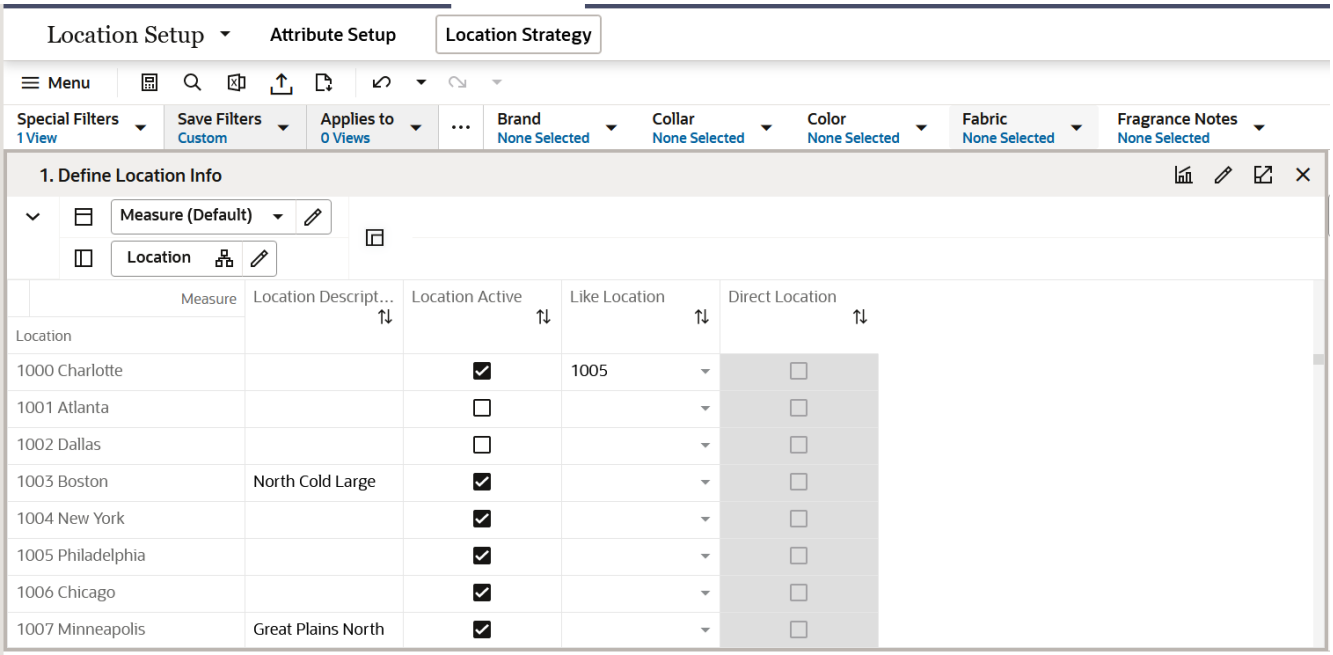
  The Location Description can be viewed as a dimension attribute used during the clustering process.

- Enable active locations or disable inactive locations by selecting or un-selecting the Location Active Boolean flag.

  Inactive Locations will not be available in Planning segments.

- Assign like store locations to new stores by using the drop-down list measure Like Location to select the existing store that will be assigned to a new store.
- Enable direct locations.

Figure 3-11 Define Location Info View



Measure Table

Table 3-11 Define Location Info View Measures

Label	Definition
Location Description	An optional description that can be applied to a location and viewed as a dimension attribute used during the clustering process.
Location Active	Boolean flag used to make a location active or inactive. If a location is inactive, it will not be available in the Location Clustering wizard or segment.
Like Location	Drop-down list measure used to select an existing store to match with a new store for Sales Retail, Units, and Gross Margin history.
Direct Location	Boolean flag used to indicate whether or not a location is online (direct) or is a physical store.

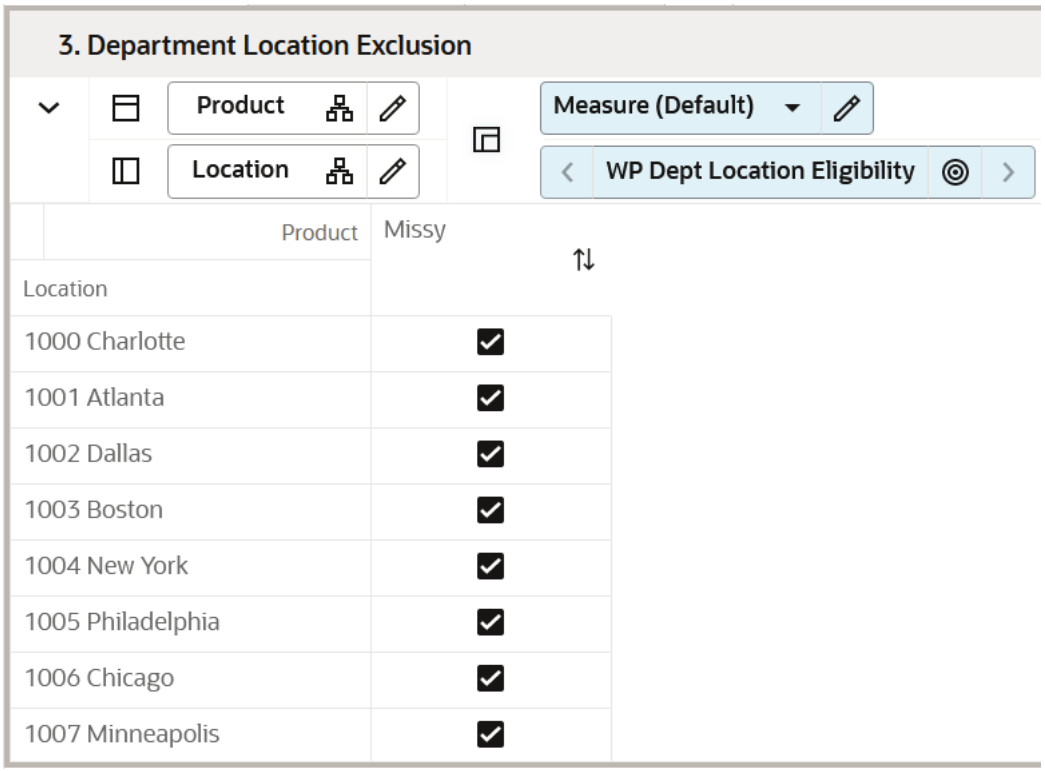
Department Location Exclusion

The Department Location Exclusion view uses a check mark for the selected stores of each department which should be excluded from the clustering process. Exclusions occur for various business reasons such as, not all merchandise is sold for all stores of a cluster.

The step to complete this process:

- Select the checkbox of the stores for each department from the list to exclude them in the store clustering process.

Figure 3-12 Department Location Exclusion View



Measure Table

Table 3-12 Department Location Exclusion View Measures

Label	Definition
Wp Dept Location Exclusion	The measure used to represent the stores to be excluded from store clustering process for each department.

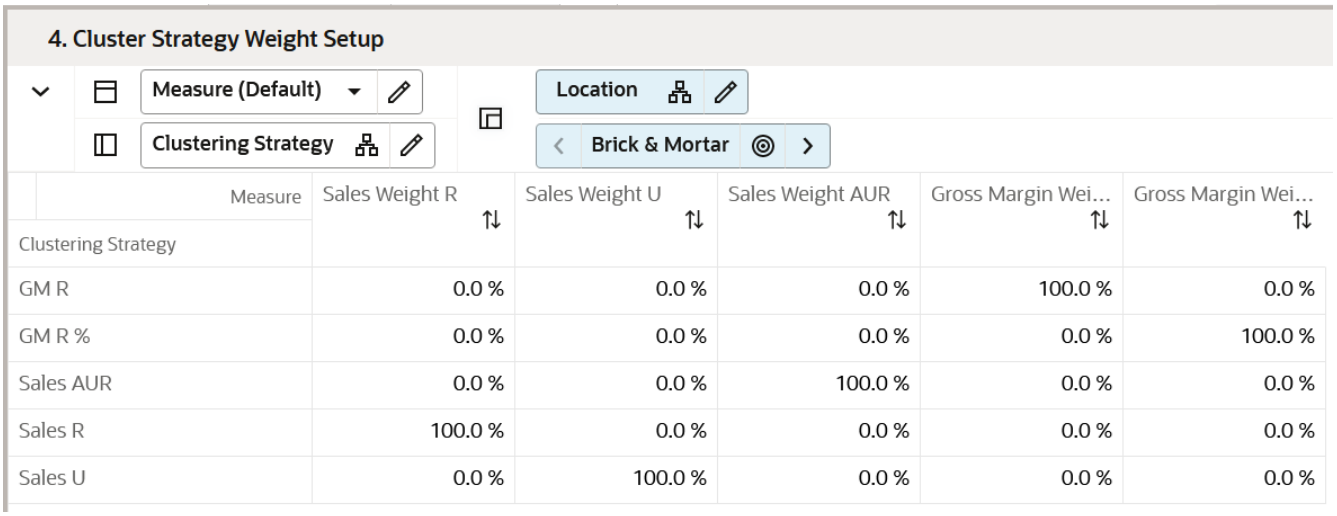
Cluster Strategy Weight Setup View

The Cluster Strategy Weight Setup view is used to enter the corporate-defined weights that correspond to each clustering strategy. The analysis and determination of strategy weights is expected to occur outside of the Assortment Planning solution, with the results available and visible within Assortment Planning to drive assortments that meet corporate objectives for each category. If desired, the Administrator may set up more clustering strategies using the Placeholder Maintenance functionality.

The step to complete this process:

- Enter performance metric weights for each Location Cluster strategy and corporate-defined weight. The total sum of the weights assigned to each cluster strategy should be 100%.

Figure 3-13 Cluster Strategy Weight Setup View



Measure Table

Table 3-13 Cluster Strategy Weight Setup View Measure

Label	Definition
Sales Weight R, U, AUR, Gross Margin Weight R, and Gross Margin Weight R %	The administrator-defined percentage weight given to the Sales metrics for the given strategy. The strategy weights are used in generating Combined Scoring for use in Location Clustering.

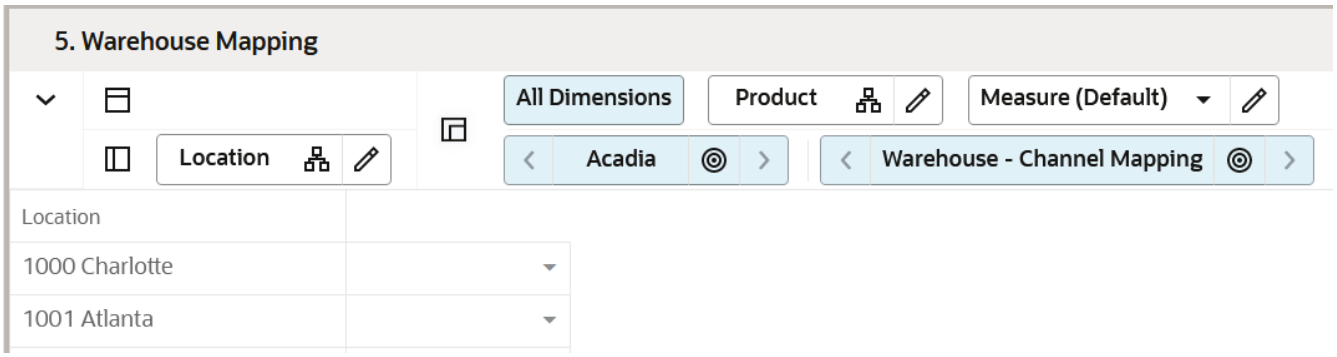
Warehouse Mapping View

The Warehouse Mapping view is used to map the corresponding warehouse to each location.

The step to complete this process:

- Select the corresponding warehouse from the drop-down list values to assign to locations.

Figure 3-14 Warehouse Mapping View



Measure Table

Table 3-14 Warehouse Mapping View Measure

Label	Definition
Warehouse - Channel Mapping	The corresponding warehouse that can be associated with the location showed in the drop-down list values for the administrator to select and assign.

Step 4: Batch Setup

The Batch Setup allows the Administrator to control which periods and positions will be exported using the standard exports within OAT. If particular positions are needed or not needed for export, the Administrator can choose that information in this step.

The steps to complete this process:

- Enable or disable positions for export.
- Enable or disable elapsed period exporting.

Tabs and Views in this Step:

- **Batch Setup Tab:**
  - Export Setup View
  - Batch Setup View

Batch Setup Tab

This tab is used to select the positions that should be included when exporting plan data and designate whether elapsed periods should be included when exporting data.

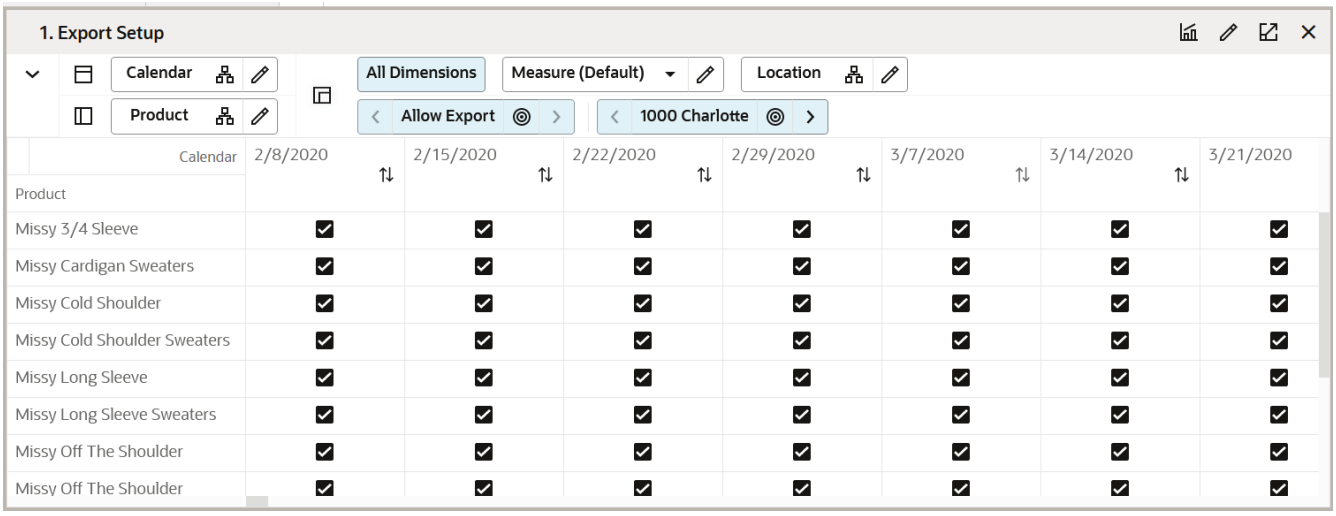
Export Setup View

The Export Setup view is used to select the positions that should be included when exporting plan data.

The step to complete this process:

- Select or deselect positions that should be included when exporting plan data.

Figure 3-15 Export Setup View



Measure Table

Table 3-15 Export Setup View Measure

Label	Definition
Allow Export	When the Boolean is checked, it is used to indicate that the position should be exported.

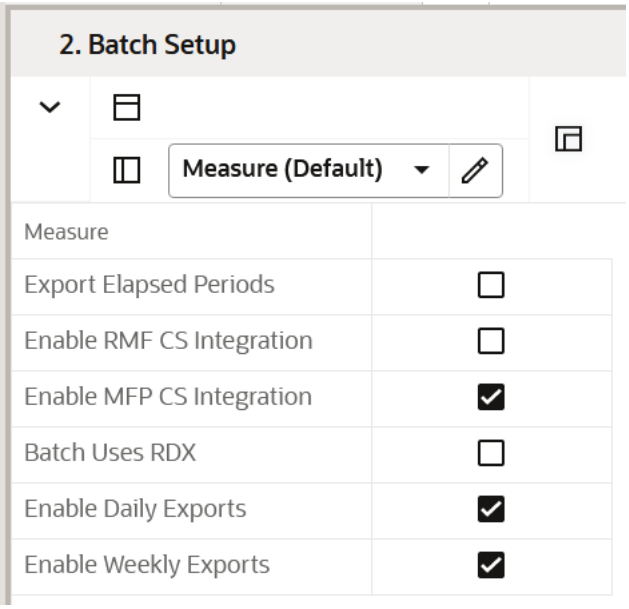
Batch Setup View

The Batch Setup view is used to designate whether elapsed periods should be included when exporting data to enable integration with Oracle Retail Merchandising Foundation Cloud Service (RMFCS).

The steps to complete this process:

- Select the Export Elapsed Periods Boolean flag to include elapsed periods in the export.
- Select the RMFCS Integration Boolean flag to enable the RMFCS integration.
- Select the MFPCS Integration flag to enable MFPCS integration.
- Select the Enable Daily Exports flag to indicate that planned data should be exported daily.
- Select the Enable Weekly Exports flag to indicate that planned data should be exported weekly.

Figure 3-16 Batch Setup View



Measure Table

Table 3-16 Batch Setup View Measures

Label	Definition
Export Elapsed Periods	Select the Boolean to indicate that elapsed periods should be exported.
Enable RMF CS Integration	Select the Boolean to indicate that RMF CS Integration is enabled.
Enable MFP CS Integration	Select the Boolean to indicate that MFP CS Integration is enabled.
Enable Daily Exports	Select the Boolean to indicate that planned data should be exported daily.
Enable Weekly Exports	Select the Boolean to indicate that planned data should be exported weekly.
Enable RSP SPO Integration	Select the Boolean to indicate that Batch should consider the integration with Profile Science from AI Foundation. Customers can use this to turn on or turn off Demand Transference integration.
Enable RSP Cluster Integration	Select the Boolean to indicate that Batch should consider the integration with Advanced Clustering from AI Foundation. Customers can use this to turn on or turn off Demand Transference integration.
Enable RSP DT Integration	Select the Boolean to indicate that Batch should consider the integration with Demand Transference from AI Foundation. Customers can use this to turn on or turn off Demand Transference integration.

Step 5: DT Setup

The DT Setup allows the Administrator to define Assortment Elasticity and Attribute Weights VAT rates to be used in the Assortment Planning segment in the Apply Demand Transference step.

The steps to complete this process:

- Review/edit the imported assortment elasticity and attribute weights.
- Set Assortment Elasticity and Attribute Weights if these are not available to import.

Tab and Views in this Step:

- **DT Setup Tab:**:
  - Define Customer Segment View
  - Review Assortment Elasticity View
  - Review Attribute Weights View

DT Setup Tab

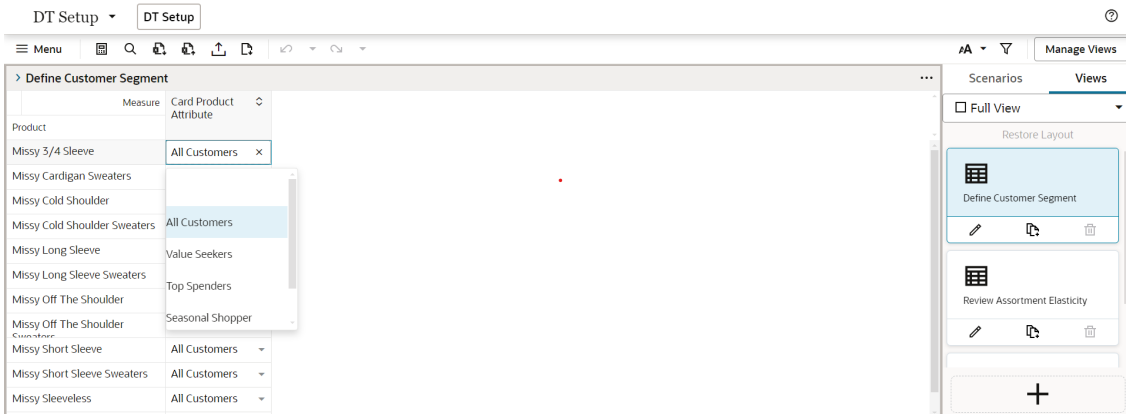
This tab is used to define the Assortment Elasticity and Attribute Weights for each subclass.

Define Customer Segment View

The steps to complete this process:

- Select customer segments for each subclass. Select the customer segment you want to target while creating and optimizing assortments.

Figure 3-17 Define Customer Segment view



Measure Table

Table 3-17 Define Customer Segment View Measure

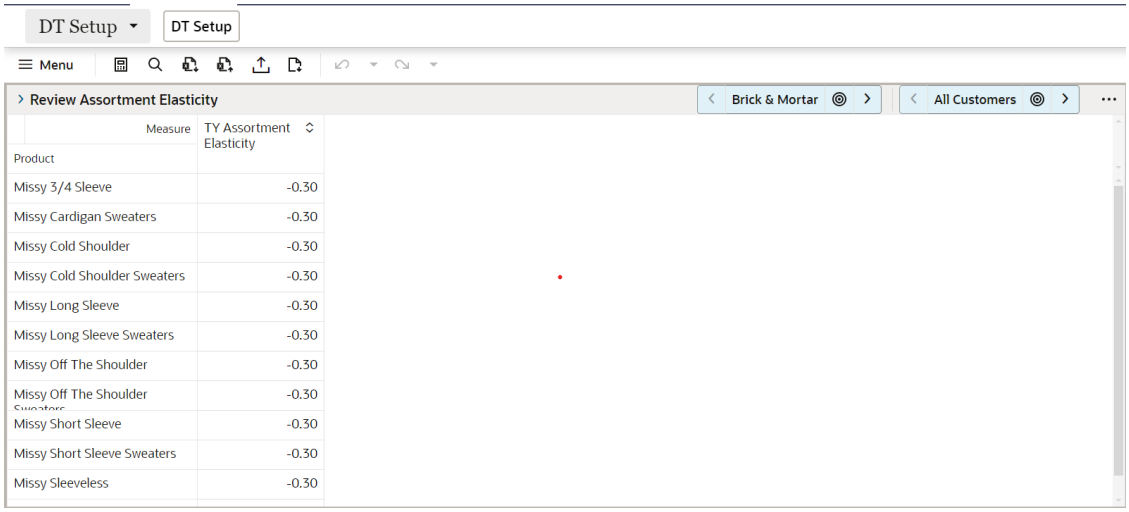
Label	Definition
Card Product Attribute	Provides you to the ability to select one of the customer segments or all of the customer segments a user would want to target while curating assortments.

Review Assortment Elasticity View

The step to complete this process:

- Review the Assortment Elasticity values for each subclass.

Figure 3-18 Review Assortment Elasticity View



Measure Table

Table 3-18 Review Assortment Elasticity View Measure

Label	Definition
TY Assortment Elasticity	This Year's Assortment Elasticity determines how much of a decrease in the cannibalization factor occurs due to the addition of items of a particular similarity.

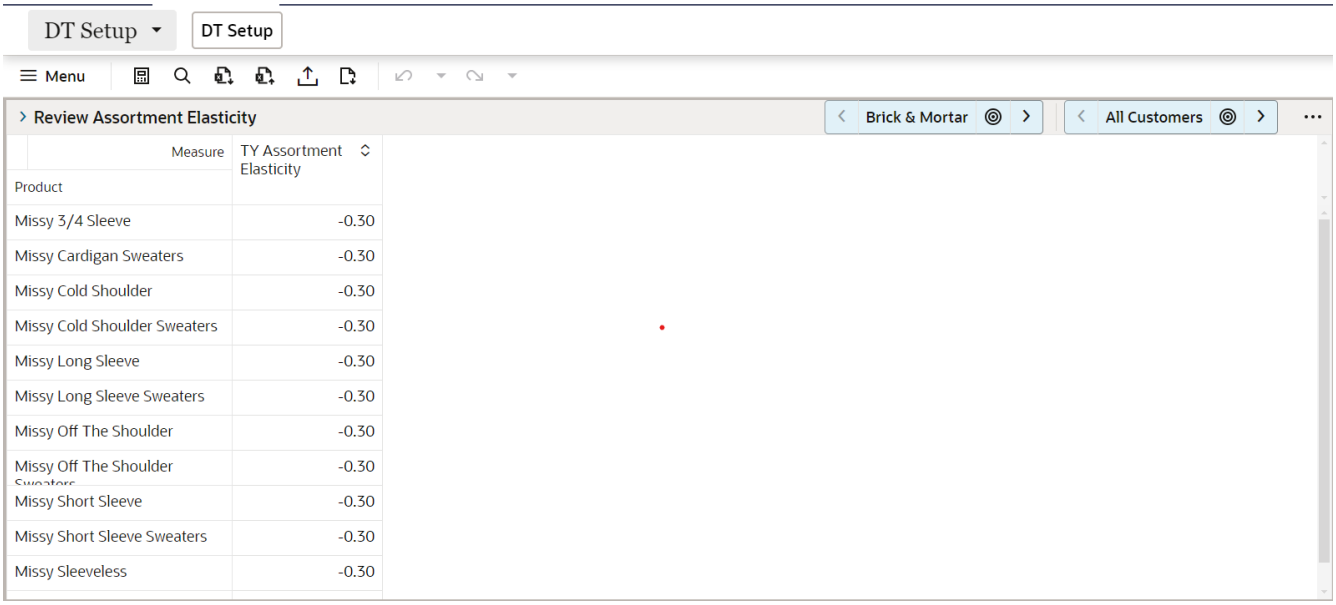
Review Attribute Weights View

The Review Attribute Weights view is used to review the weightage given to each product attribute in the system in comparison with other attributes.

The steps to complete this process:

- Review or edit the attribute weights loaded from AI Foundation.

Figure 3-19 Review Attribute Weights View



Measure Table

Table 3-19 Review Attribute Weights View Measure

Label	Definition
TY Attribute Weight %	This Years Attribute Weight for each of the product attributes is subclass level which would be normalized to 100 during DT calculations.

Step 6: Size Profile Setup

The Size Profile Setup allows the Administrator to define size profiles to be used in the Assortment Planning segment. The size profiles can either be manually loaded or integrated from the Profile Science module of AI Foundation. The size profiles are used to split Buy Quantity by size as well as receipts by size.

The steps to complete this process:

- Review or edit the Size profiles for different size ranges.

Tabs and Views in this Step:

- **Size Profile Setup Tab:**
  - Define Size Profiles View

Size Profile Setup Tab

Use this tab to define the Size profiles for each subclass.

Define Size Profiles View

The step to complete this process:

- Define and Review the Admin size profile and the SPO size profile values for each subclass.

Measure Table

Table 3-20 Define Size Profiles View Measures

Label	Definition
Admin Size Profile %	The size profiles created by the Administrator either manually entering or by loading a flat file.
SPO Size Profile %	Size profiles integrated from an external system like profile science from AI Foundation.
Size Profile PreRange	Boolean measure to determine the various or latest or most relevant size Ranges to be shown the in Assortment and Item planning process. This measure provides a filtered list from the large list of ranges to choose from.

4
Validate Loaded Data

The Validate Loaded Data task is used to view loaded historical actuals as well as the loaded Merchandise Financial Planning Plan, Location Plan, and Forecast. This segment is used as a reference point to allow the Administrator to view loaded data to ensure accuracy. This task will generally be used on demand as questions from the business arise about historical or plan data.

Typical Business Users

The typical user of the Validate Loaded Data task is an Administrator who needs to check historical data and/or MFP Location Plan data and Forecast data that has been loaded into the solution.

Data Requirements

The following are the data requirements for this task:

- Loaded historical actuals
- Loaded MFP plan
- Loaded Location plans
- Loaded Forecast

Validate Loaded Data Process Steps

The following are the high-level steps to complete this process:

- Review actuals
- Review MFP plans
- Review Location plans
- Review Forecast

Create the Validate Loaded Data Segment

To create the Validate Loaded Data segment:

1. Click **Assortment Services** in the Task menu. Then, click the Planning Administration activity and then the Validate Loaded Data task.
2. The dialog to create New Plan opens. Click **Create New Plan**.
3. In Select Calendar, select the time periods to be included in the segment and click **Next**.
4. In Select Location, select the channels to be included and click **Next**.
5. In Select Product, select one or multiple departments and click **Finish**.

   The Planning Administration segment is built.

Step 1: Actuals

The step to complete this process:

- Review actual data as necessary.

Tab and View in this Step:

- **Actuals Tab:**
  - TY Version View

Actuals Tab

This tab is used to review actuals data.

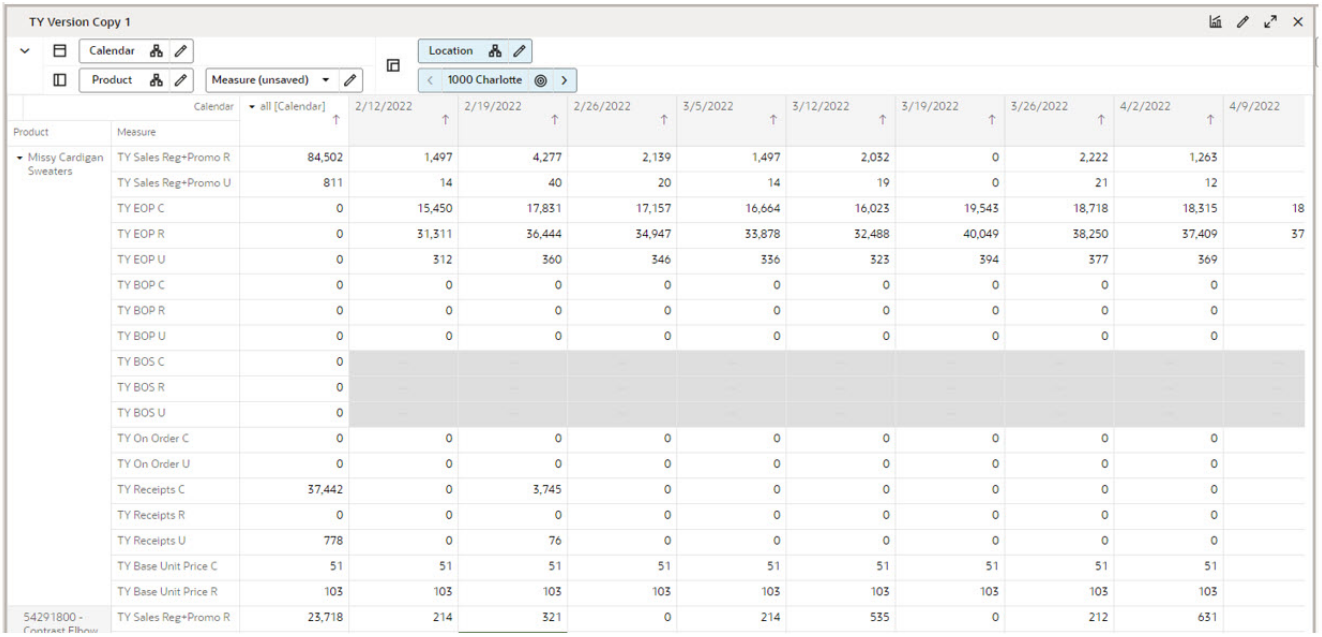
TY Version View

The step to complete this process:

- Review actual data.

  Additional measures are available in the Measure Show/Hide menu.

Figure 4-1 TY Version View



Product	Measure	all [Calendar]	2/12/2022	2/19/2022	2/26/2022	3/5/2022	3/12/2022	3/19/2022	3/26/2022	4/2/2022	4/9/2022
Missy Cardigan Sweaters	TY Sales Reg+Promo R	84,502	1,497	4,277	2,139	1,497	2,032	0	2,222	1,263	
	TY Sales Reg+Promo U	811	14	40	20	14	19	0	21	12	
	TY EOP C	0	15,450	17,831	17,157	16,664	16,023	19,543	18,718	18,315	18
	TY EOP R	0	31,311	36,444	34,947	33,878	32,488	40,049	38,250	37,409	37
	TY EOP U	0	312	360	346	336	323	394	377	369	
	TY BOP C	0	0	0	0	0	0	0	0	0	
	TY BOP R	0	0	0	0	0	0	0	0	0	
	TY BOP U	0	0	0	0	0	0	0	0	0	
	TY BOS C	0									
	TY BOS R	0									
	TY BOS U	0									
	TY On Order C	0	0	0	0	0	0	0	0	0	
	TY On Order U	0	0	0	0	0	0	0	0	0	
	TY Receipts C	37,442	0	3,745	0	0	0	0	0	0	
	TY Receipts R	0	0	0	0	0	0	0	0	0	
	TY Receipts U	778	0	76	0	0	0	0	0	0	
	TY Base Unit Price C	51	51	51	51	51	51	51	51	51	
	TY Base Unit Price R	103	103	103	103	103	103	103	103	103	
54291800 - Contrast Elbow	TY Sales Reg+Promo R	23,718	214	321	0	214	535	0	212	631	

Measure Table

Table 4-1 TY Version View Measures

Label	Definition
TY Sales R, C, U	Loaded actual Sales Retail, Cost, and Units by item, location, and week.
TY EOP R, C, U	Loaded End Of Period Inventory Retail, Cost, and Units by item, location, and week.
TY On Order C, U	Loaded On Order Cost, and Units by item, location, and week.
TY Receipts C, U	Loaded Receipts for Cost, and Units by item, location, and week.
TY Customer Returns R, C, U	Loaded Customer Returns for Retail, Cost, and Units by item, location, and week.
TY Sales Reg R, U	Loaded regular Sales Retail and Units by item, location, and week.
TY Traffic Count U	Loaded Traffic Count Units by item, location, and week.
TY Transaction Count U	Loaded Transaction Count Units by item, location, and week.
Fcst Sales U	Loaded Forecast and Actual Sales Units by item, location, and week.

Step 2: MFP & Loc Plan

The steps to complete this process:

- Review MFP loaded data as necessary.
- Review Location Plan loaded data as necessary:
  - If a Location Plan is not available, the MFP CP view displays the MFP Current Plan by Subclass spread to Location using last year's location sales' proportionality.
  - If a Location Plan is available, the MFP CP view displays the MFP Current Plan by Subclass spread to Location using the Location Plan CP sales' proportionality.

Tab and Views in this Step:

- **MFP Plan Tab:**
  - Loaded MFP View
  - Forecast View

MFP Plan Tab

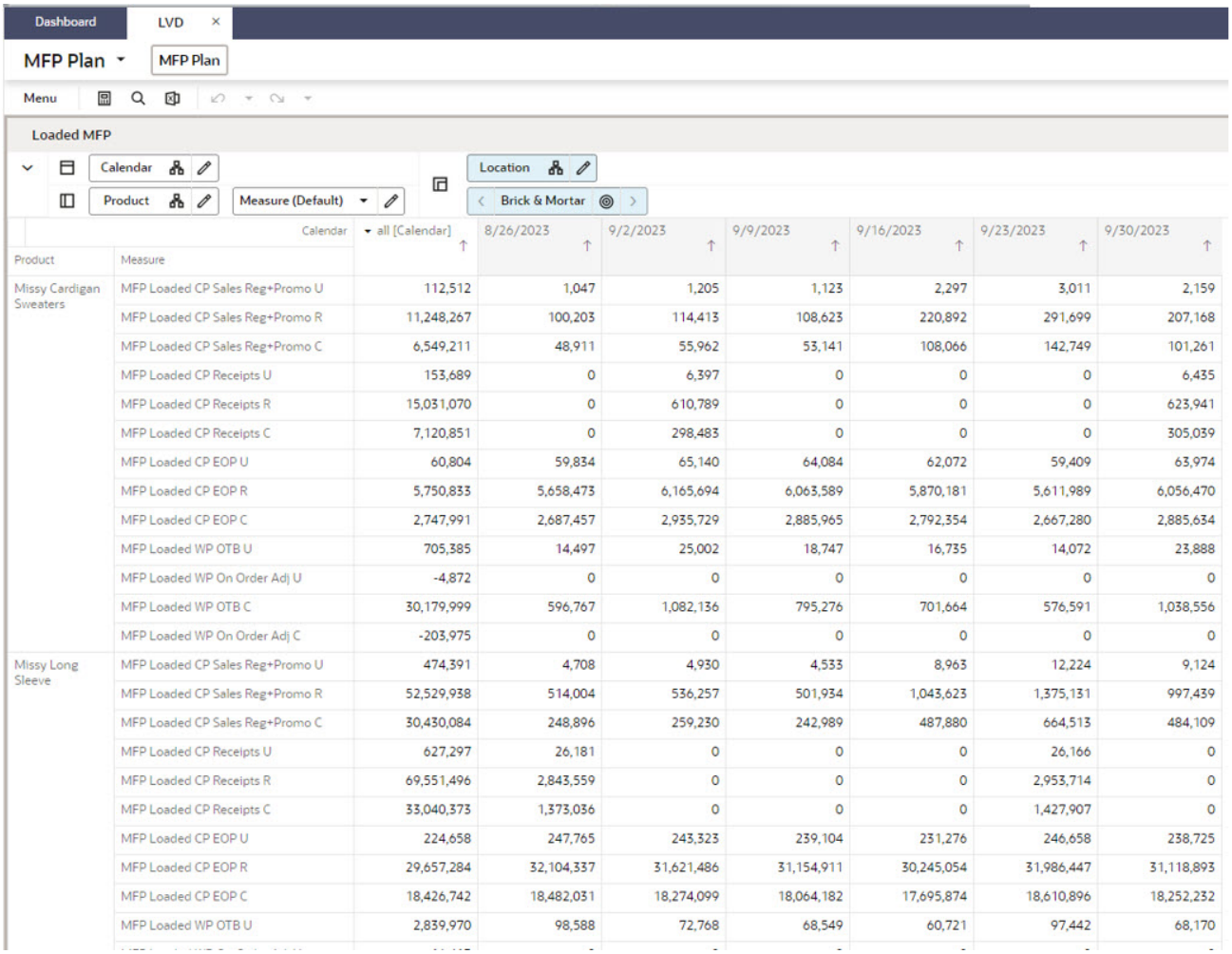
This tab is used to work with loaded data.

Loaded MFP View

The step to complete this process:

- Review MFP CP Sales R, Sales C, Sales U, EOP R, EOP C, EOP U, Receipts C, Receipts U, Customer Returns U, and Customer Returns R, and MFP Loaded WP OTB U, OTB C, On Order Adj U, and Order Adj C data.

Figure 4-2 Loaded MFP View



Product	Measure	all [Calendar]	8/26/2023	9/2/2023	9/9/2023	9/16/2023	9/23/2023	9/30/2023
Missy Cardigan Sweaters	MFP Loaded CP Sales Reg+Promo U	112,512	1,047	1,205	1,123	2,297	3,011	2,159
	MFP Loaded CP Sales Reg+Promo R	11,248,267	100,203	114,413	108,623	220,892	291,699	207,168
	MFP Loaded CP Sales Reg+Promo C	6,549,211	48,911	55,962	53,141	108,066	142,749	101,261
	MFP Loaded CP Receipts U	153,689	0	6,397	0	0	0	6,435
	MFP Loaded CP Receipts R	15,031,070	0	610,789	0	0	0	623,941
	MFP Loaded CP Receipts C	7,120,851	0	298,483	0	0	0	305,039
	MFP Loaded CP EOP U	60,804	59,834	65,140	64,084	62,072	59,409	63,974
	MFP Loaded CP EOP R	5,750,833	5,658,473	6,165,694	6,063,589	5,870,181	5,611,989	6,056,470
	MFP Loaded CP EOP C	2,747,991	2,687,457	2,935,729	2,885,965	2,792,354	2,667,280	2,885,634
	MFP Loaded WP OTB U	705,385	14,497	25,002	18,747	16,735	14,072	23,888
	MFP Loaded WP On Order Adj U	-4,872	0	0	0	0	0	0
	MFP Loaded WP OTB C	30,179,999	596,767	1,082,136	795,276	701,664	576,591	1,038,556
	MFP Loaded WP On Order Adj C	-203,975	0	0	0	0	0	0
Missy Long Sleeve	MFP Loaded CP Sales Reg+Promo U	474,391	4,708	4,930	4,533	8,963	12,224	9,124
	MFP Loaded CP Sales Reg+Promo R	52,529,938	514,004	536,257	501,934	1,043,623	1,375,131	997,439
	MFP Loaded CP Sales Reg+Promo C	30,430,084	248,896	259,230	242,989	487,880	664,513	484,109
	MFP Loaded CP Receipts U	627,297	26,181	0	0	0	26,166	0
	MFP Loaded CP Receipts R	69,551,496	2,843,559	0	0	0	2,953,714	0
	MFP Loaded CP Receipts C	33,040,373	1,373,036	0	0	0	1,427,907	0
	MFP Loaded CP EOP U	224,658	247,765	243,323	239,104	231,276	246,658	238,725
	MFP Loaded CP EOP R	29,657,284	32,104,337	31,621,486	31,154,911	30,245,054	31,986,447	31,118,893
	MFP Loaded CP EOP C	18,426,742	18,482,031	18,274,099	18,064,182	17,695,874	18,610,896	18,252,232
	MFP Loaded WP OTB U	2,839,970	98,588	72,768	68,549	60,721	97,442	68,170

Measure Table

Table 4-2 Loaded MFP View Measures

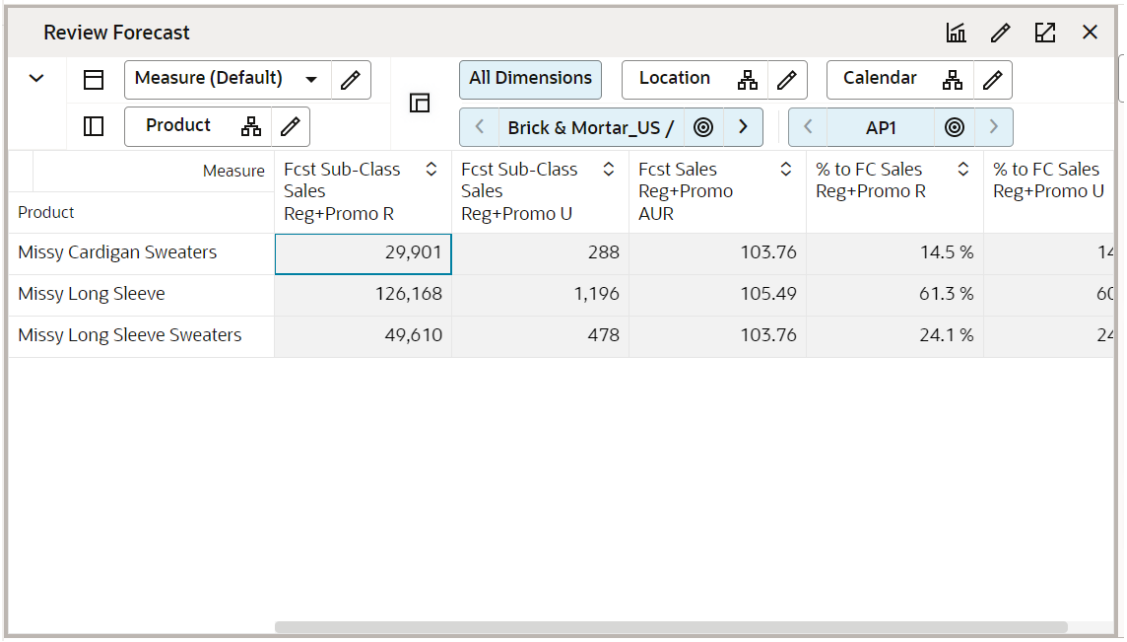
Label	Definition
MFP Loaded CP Sales R, C, U	Loaded MFP Current Plan Sales Retail, Cost, and Units by Subclass, channel, and week.
MFP Loaded CP EOP R, C, U	Loaded MFP Current Plan End of Period Inventory Retail, Cost, and Units by Subclass, channel, and week.
MFP Loaded CP Receipts C, U	Loaded MFP Current Plan Receipts Cost and Units by Subclass, channel, and week.
MFP Loaded CP Customer Returns U, R	Loaded MFP Current Plan Customer Returns for Units and Retail by Subclass, channel, and week.
MFP Loaded WP OTB U, C	Loaded MFP Working Plan Open to Buy Units and Cost by Sub-class, channel, and week.
MFP Loaded WP On Order Adj U, C	Loaded MFP Working Plan On Order Units and Adjusted Units, Cost by department, store, and week.

Forecast View

The step to complete this process:

- Review Forecast Sales U for Pre-season and In-season at style-color/location level.

Figure 4-3 Forecast View



Measure Table

Table 4-3 Forecast View Measures

Label	Definition
Forecast In-season Sales U	Forecast Sales Units for In-season
Forecast Pre-season Sales U	Forecast Sales Units for Pre-season

5
Planning Maintenance

The Planning Maintenance task is used for Location Clustering, Assortment Period Maintenance, Placeholder Maintenance, and Curve Maintenance.

Typical Business Users

The typical user of the Planning Maintenance task is an assortment planner who has business knowledge of the strategy to create location clusters as well as knowledge of assortment period dates.

Data Requirements

The following are the data requirements for this task:

- Sales Retail, Sales Units, and Gross Margin actuals
- Location attributes assigned in Administration
- Like-location assignments for new locations in Administration
- To use MFP as a seeding source: MFP Location Plan
- To use Inventory Planning Optimization Cloud Service-Demand Forecasting as a seeding source: IPOCS-Demand Forecasting interfaced forecast
- To use company-defined Strategy Weights: strategy weight assignments in the Administration
- Approved location clusters

6
Location Clustering

Location Clustering is a business process where the assortment planner classifies the retailer's location base into multiple groups of locations that are similar in performance, space, or other user-defined attributes. Each cluster contains similar locations according to attribute criteria chosen by the assortment planner, allowing for more efficient management of multiple assortments. Clustering allows you to choose a combination of up to three location attributes, although it is not necessary to select all three. The more attributes selected for clustering, the more clusters will be created. You must balance creating targeted assortments with the workload increase associated with managing more items, suppliers, planograms, and other factors associated with larger assortments. Multiple subcategories and categories can be selected at one time for clustering with all of the subcategories receiving the same set of clusters. Multiple channels may be selected at a time, and each channel may have multiple clusters. All locations within a cluster receive an identical assortment.

If the Advanced Clustering module is also implemented, the location clusters created in Advanced Clustering in AI Foundation can be integrated with the Assortment Planning solution and used in the subsequent steps in the process. Refer to the *Oracle Retail Assortment Planning Implementation Guide* to understand the integration requirements.

Multiple versions of clusters may be created and assigned to different Assortment Groups, also referred to as buying periods or seasons. In this way, clusters can be specific to an assortment as well as be reused. When creating an assortment period, you will choose a cluster version to be used for that season that will impact the assortments planned.

Key Concepts

This section describes key concepts for location clustering.

Scaled Scoring Methodology

The Scaled Scoring calculation is used to score each location based on its sales performance. Scaled Scoring is a method to rank locations using Sales R, Sales U, Sales AUR, GM R, or a combination of those metrics to provide a score that normalizes variability if more than one metric is selected for inclusion in scoring. It transforms all metrics into a common and comparable unit of measure, eliminating metric variability. Each location gets a score based on its relative position to the minimum and maximum value of the sales metric selected, from 1 to 100. The lowest performing location gets a score of 1 and the highest performing location gets a score of 100. If multiple performance metrics are selected for inclusion in the calculation, Scaled Scoring uses the weights assigned to each metric to calculate the final score. If a location has no sales performance data, it will not be included in the calculation.

Breakpoint Algorithm

The Breakpoint algorithm splits locations into clusters that have equal intervals, based on a user-defined number of intervals set in the Performance Group measure. You may select up to five performance groups. For example, you could select four performance groups and decide to give Sales U a 100% weight. The system will then review the Sales U for all of the locations that you selected in the wizard, calculate the Scaled Scoring, and break the locations into four groups, calculating the upper and lower boundaries in the process. You can override the upper

boundaries if they have business knowledge that suggests a better result. The upper boundary of the highest performance group is always the maximum of the Scaled Scoring of locations.

Optimized Algorithm

The Optimized algorithm is a science-based method that creates optimized clusters utilizing user set parameters. It involves the following:

- Create many centroids for each cluster based on the number of clusters you want.
- Based on each location's performance numbers, assign a cluster to the location. With this, there is a set of clusters with locations attached to them.
- The algorithm then checks the centroid to see if there is a better position for the centroid that gives a better assignment of locations to each cluster.
- The previous process is repeated until the result of each iteration is better than the previous one.
- After it is not possible to further optimize, the resulting clusters are returned for review.

Typical Business Users

The typical user of the location clustering task is an assortment planner who has business knowledge of the strategy used to achieve the business goals for location clusters they are creating.

Data Requirements

The following are the data requirements for this task:

- Sales Retail, Sales Units, and Gross Margin actuals
- Location attributes assigned in Administration
- Like-location assignments for new locations in Administration
- To use MFP as a seeding source: MFP Location Plan
- To use Inventory Planning Optimization Cloud Service-Demand Forecasting as a seeding source: IPOCS-Demand Forecasting interfaced forecast
- To use company-defined Strategy Weights: strategy weight assignments in the Administration
- To use Space Groups: space metrics by location loaded in Administration

Location Clustering Process Steps

The high-level steps to complete this process:

- Seed or enter Location Cluster strategy weights.
- Review and choose location attributes to determine the optimal attributes to select for the category or categories being clustered.
- Choose the algorithm method to perform clustering: Breakpoint or Optimized.
- Run the clustering process.
- Review and analyze the results, making updates as necessary.

- Approve the results to be used in Assortment Planning

Create the Location Clustering Segment

To create the Location Clustering segment:

1. Click **Assortment Services** in the Task menu. Then, click the Planning Maintenance activity and then the Location Clustering task.
2. The dialog to create New Plan opens. Click **Create New Plan**.
3. Enter the Plan Label in the text field. Click **Ok**.
4. In Select Product, select one or multiple categories and click **Next**. If you select multiple categories, all of them will receive the same clusters.
5. In Select Sales Source, select the sales data source you would like to use and click **Next**.

   The choice of Actual, Forecast, or Plan in this wizard screen determines the performance values in the Location Clustering task:

   - If the retailer has Inventory Planning Optimization Cloud Service-Demand Forecasting, then the IPOCS-Demand Forecasting forecast can be interfaced with Assortment Planning Cloud Service.
   - If Plan is selected, the sales performance data will be based on MFP Cloud Service Current Plan Sales.

     For elapsed periods, MFP Current Plan Sales is loaded with actuals. If the calendar periods selected include elapsed periods, the data could include Actuals and Plan.
   - If Actuals is selected but you pick a future time period, you will not see data.
6. In Select Calendar, select the time periods to display in the segment. It is recommended that you bring in at least six months of data.

   Click **Finish**. The Location Clustering segment is built.

Step 1: Setup

The first step in the clustering process is Setup. You will review location attribute performance data to determine which attributes should be used for clustering, assign strategy weighting, and determine the methodology to create the location clusters.

The steps to complete this process:

- Review location attributes to determine the best attributes to choose for the category that is being clustered.
- Choose which attributes to use to create clusters in Clustering Setup.
- Seed strategy weights or assign weights to the appropriate performance measures.
- Determine the number of Performance Groups to be used to create clusters, with a maximum of five available.
- Select which algorithm to create clusters: Breakpoint or Optimized.
- If using Space Groups, determine the number of space groups and the space source.
- Run the Create Cluster Application Action to create clusters.

Tab and Views in this Step:

- **Setup Tab:**
  - Attribute Analysis View
  - Clustering Setup View
  - Sales Perf Group Setup View
  - Space Group Setup View

Application Actions

Seed Strategy Weights

The Seed Strategy Weights Application Action utilizes the Strategy Weights set up in the Administration segment. Running this Application Action will populate the performance metrics with the administrator-defined weights sourced from the Administrator segment.

Optimize Clusters

The Optimize Clusters Application Action signals the system to run the BaNG algorithm process to create clusters using the K-means science-based methodology.

Create Cluster

The Create Cluster Application Action calculates location clusters based on the user-defined parameters selected in Initial Setup. If attributes, performance metric weights, # of performance groups, or the clustering method is updated, the Create Cluster Application Action must be rerun to see updated results.

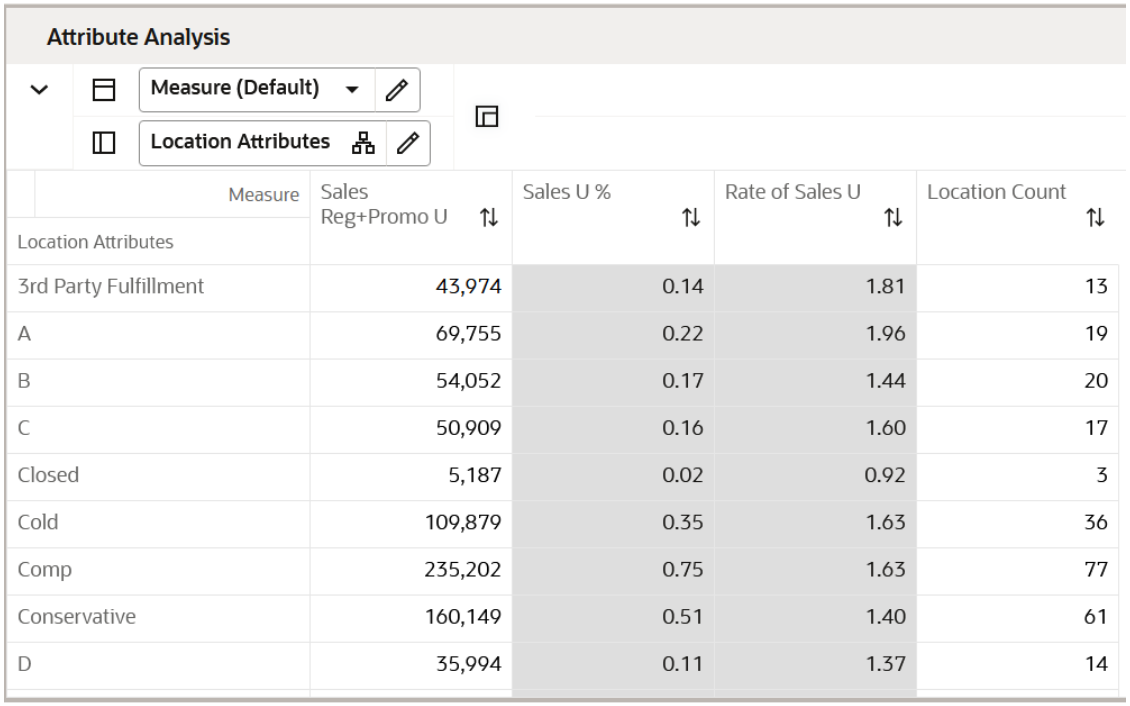
Setup Tab

This tab is used to analyze measure values for the location attributes and set up location clusters.

Attribute Analysis View

The Attribute Analysis view is used to show attributes that are assigned to each location, along with performance data that corresponds to the Sales Source measure (Plan, Forecast, Actuals) and the calendar periods selected in the wizard process. Reviewing and analyzing the data provides input to you when deciding which attributes to use in the clustering process.

Figure 6-1 Attribute Analysis View



Measure / Location Attributes	Sales Reg+Promo U	Sales U %	Rate of Sales U	Location Count
3rd Party Fulfillment	43,974	0.14	1.81	13
A	69,755	0.22	1.96	19
B	54,052	0.17	1.44	20
C	50,909	0.16	1.60	17
Closed	5,187	0.02	0.92	3
Cold	109,879	0.35	1.63	36
Comp	235,202	0.75	1.63	77
Conservative	160,149	0.51	1.40	61
D	35,994	0.11	1.37	14

Measure Table

Table 6-1 Attribute Analysis View Measures

Label	Definition
Sales U	The sales units for the categories, calendar periods, and sales source that were selected in the wizard process shown by location attribute.
Sales U %	The sales unit contribution to the total for each attribute, for the categories, calendar periods, and sales source that were selected in the wizard process, shown by location attribute.
Rate of Sales U	The weekly rate of sales for the categories, calendar periods, and sales source that were selected in the wizard process, shown by location attribute.
Location Count	The number of locations assigned to each attribute.

Measure Profile

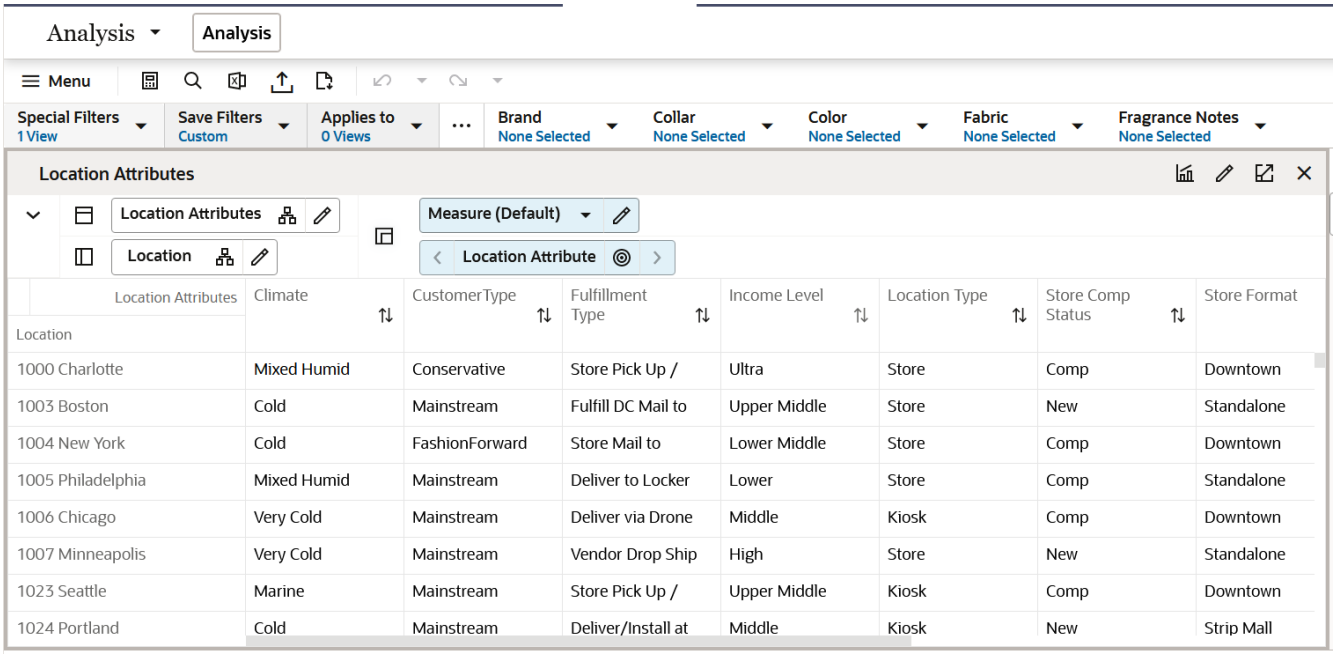
Default Profile

The Default profile is used to review performance data by attribute, to determine which attributes will create meaningful clusters.

Location Attributes View

The Location Attributes view allows you to review all the attributes and characteristics defined for every single store. This is a read-only view displaying the data set up in the location setup located in the planning Administration section. You can review the attributes to make key decisions on location clustering.

Figure 6-2 Location Attributes View



Location Attributes / Location	Climate	CustomerType	Fulfillment Type	Income Level	Location Type	Store Comp Status	Store Format
1000 Charlotte	Mixed Humid	Conservative	Store Pick Up /	Ultra	Store	Comp	Downtown
1003 Boston	Cold	Mainstream	Fulfill DC Mail to	Upper Middle	Store	New	Standalone
1004 New York	Cold	FashionForward	Store Mail to	Lower Middle	Store	Comp	Downtown
1005 Philadelphia	Mixed Humid	Mainstream	Deliver to Locker	Lower	Store	Comp	Standalone
1006 Chicago	Very Cold	Mainstream	Deliver via Drone	Middle	Kiosk	Comp	Downtown
1007 Minneapolis	Very Cold	Mainstream	Vendor Drop Ship	High	Store	New	Standalone
1023 Seattle	Marine	Mainstream	Store Pick Up /	Upper Middle	Kiosk	Comp	Downtown
1024 Portland	Cold	Mainstream	Deliver/Install at	Middle	Kiosk	New	Strip Mall

Measure Table

Table 6-2 Location Attributes View Measure

Label	Definition
Location Attributes	The location attributes measure holds the different attributes of each store.

Define Location Rollup View

The Define Location Rollup view is used to select Location attributes to view in an alternate hierarchy. This is available in the tab to display the Store level. The Nested Location attribute rollup is provided with three levels. You can set up to three different combinations for nested rollup with a maximum of three levels in each combination. Nesting of dynamic attributes is a configurable option.

You can analyze, review, and edit the clustering decisions based on important attributes. You may select up to three attributes at a time for the dynamic rollup.

The steps to complete this process:

- Select up to three dynamic location attributes from the drop-down list.
- Run the Refresh Location Rollup Application Action.
- To view the location attribute:
  - In a view that displays the store level, click the Location Hierarchy tile.
  - Select the attribute (Attribute 1 or 2 or 3) that you would like to view in the nested dynamic rollup.
  - Click **OK**.

Figure 6-3 Define Location Rollup View

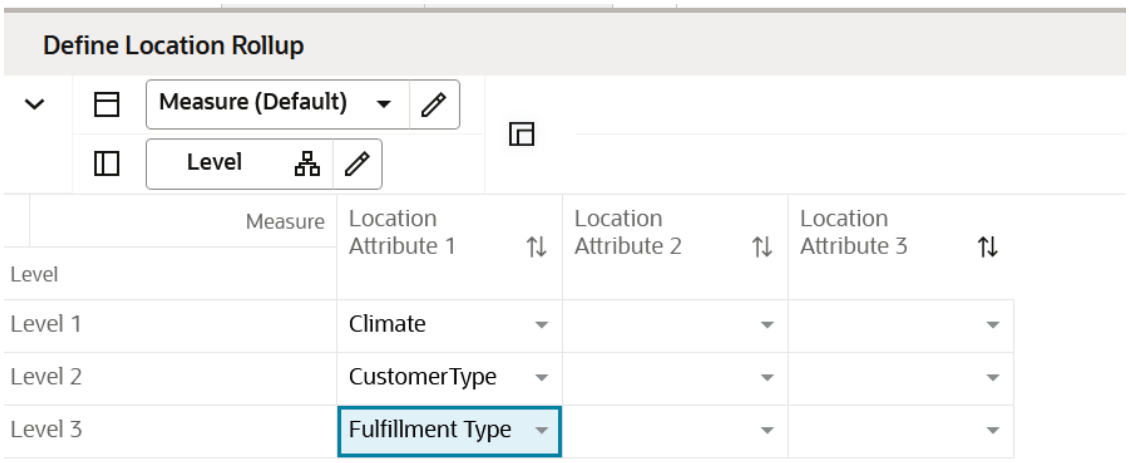
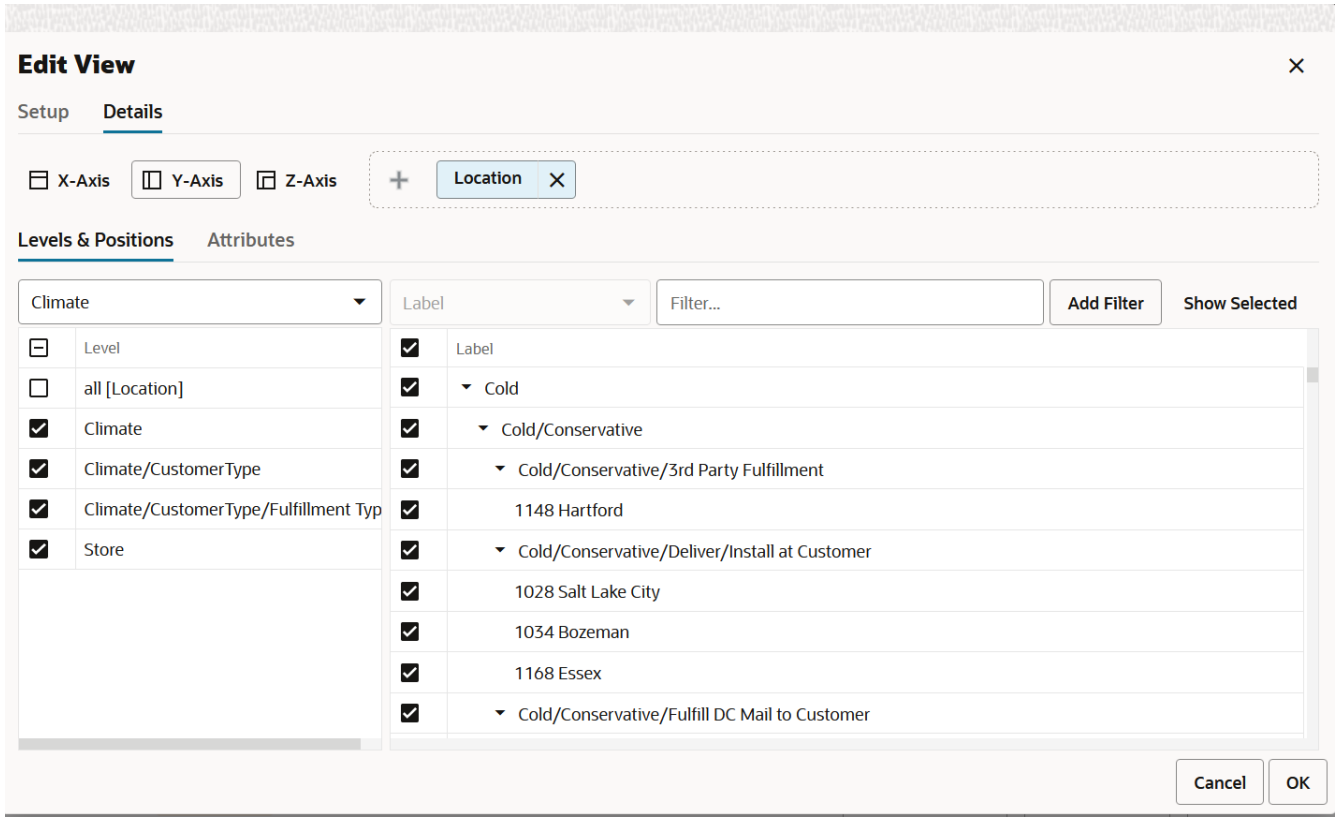


Figure 6-4 Edit View



When selecting the alternate dynamic hierarchy defined in the Define Location Rollup View, you can see the subtotals at each nested level. For all the editable measures, you can edit these subtotals to spread the values to all the associated positions.

Measure Table

Table 6-3 Define Location Rollup View Measure

Label	Definition
Location Attribute 1, 2, 3	Drop-down list to present Location attributes for nested dynamic Location hierarchy rollup.

Measure Profile

Default Profile

The Default profile is used to select dynamic location attributes. You can view up to three Levels to review and work on Plans rolled up to multiple attributes. Using the nested dynamic location rollup feature, you can group plans for three different attributes. For all the editable measures, you can even edit these subtotals visible across each level to spread the plans to lower positions.

Application Action

Refresh Location Rollup

The Refresh Location Rollup Application Action creates dynamically updated alternate hierarchies based on user-defined attribute selections. After running the application action, you may select the alternate location hierarchy to see plans combined based on the attribute selections.

Clustering Setup View

The Clustering Setup view allows you to select up to three location attributes that can be used to create clusters and to seed or assign Strategy Weights for the category, based on business knowledge of the strategy for the category.

> **Note:**
>
> The total sum of the weights assigned to all the metrics should be 100%; if the weights do not sum up to 100%, they are re-normalized upon the next commit and refresh.

Things to consider when choosing the Sales Perf Group attribute:

- Which performance measure, or combination of performance measures, should I choose? The category strategy should inform this decision. For example, if the category is a traffic driver, then choosing units as the performance metric makes sense. If the category's purpose is to drive profit, then choosing Gross Margin makes sense.

  Your company may have a defined performance strategy for each category, which would be assigned in the Administrator segment. If so, then seed the weights.
- How many Performance Groups do I want for this category? You may select from 1 to 5. Selecting 1 is a good option if you do not want to break your clusters down by sales grade. As you select more groups, you will have more clusters to manage, with fewer locations assigned to each cluster.

If neither the Perf Group Setup nor the Space Group Setup is selected, but at least one other attribute is selected, you can run the Create Cluster Application Action now, since performance and space setups do not need to be created. Keep in mind that as more attributes are selected, more clusters will be created, with a corresponding increase in workload.

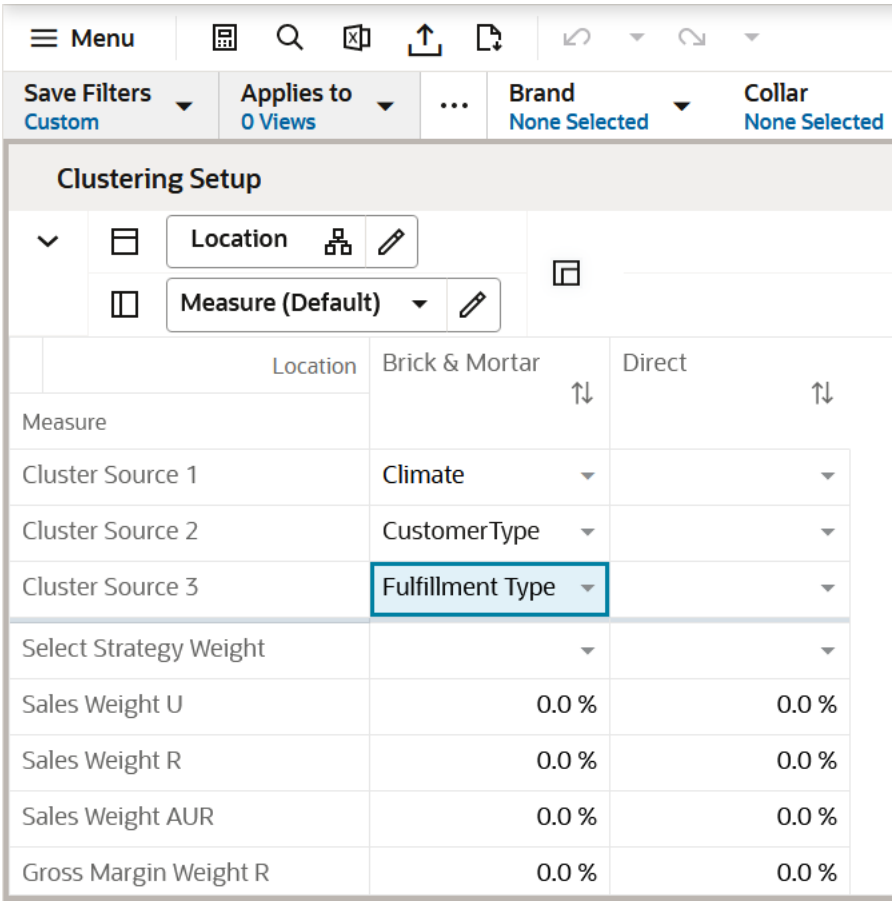
The step to complete this process:

- Select up to three location attributes for clustering.
- If Sales Perf Group is selected as an attribute, performance weights must be seeded or assigned:
  - If seeding the performance weights, select the appropriate strategy for the category and clusters in the Select Strategy Weight drop-down list measure.
  - Run the Seed Strategy Weight Application Action to populate the corresponding performance metrics.

    The Strategy Weights were set by the Administrator.
  - You have the option of overriding the weights based on their business knowledge of the category strategy.
- When selecting a clustering strategy, select a strategy that supports the goals for the category.

  For example, if the category is used to drive traffic, you should select a strategy that supports that goal and will likely have Units weighted highly or at 100%.
- If not selecting Sales Perf Group or Space as attributes, run the Create Cluster Application Action.

Figure 6-5 Clustering Setup View



Measure Table

Table 6-4 Clustering Setup View Measures

Label	Definition
Cluster Source 1, 2, 3	Drop-down lists used to select location attributes to create clusters. At least one selection is necessary to create clusters.
Select Strategy Weight	Drop-down list used to select the appropriate strategy for the category and clusters, which will populate the Administrator assigned strategy weights after running the Seed Strategy Weights Application Action.
Sales Weight U, R, AUR, Gross Margin R, Gross Margin R %	Performance weights set by the Administrator or planner, used to create location clusters based on the category strategy.

Measure Profile

Default Profile

The Default profile is used to select the location attributes and assign performance weighting used in creating clusters.

Application Action

Seed Strategy Weights

The Seed Strategy Weights Application Action utilizes the Strategy Weights set up in the Administration segment. Running this Application Action will populate the performance metrics with the administrator-defined weights sourced from the Administrator segment.

Sales Perf Group Setup View

The Sales Perf Group Setup view is used to define the number of performance groups and select the algorithm used for clustering. The maximum number of performance groups is five.

To review the definitions of Breakpoint and Optimized, see Key Concepts

If using the Breakpoint algorithm, the steps to complete this process:

- Enter the number of performance groups you want to create for the category, with a maximum of five available.
- Review the Upper Breakpoint Boundaries; adjust the upper boundaries if you have business knowledge that suggests a better result.

  If you adjust the upper boundary, it will only be valid for the current session and will not be committed to the segment. When you create a new segment, the system will revert to the recommended values.
- Review the Location Count and Avg Sales U for each performance group.
- Run the Create Cluster Application Action to create clusters.

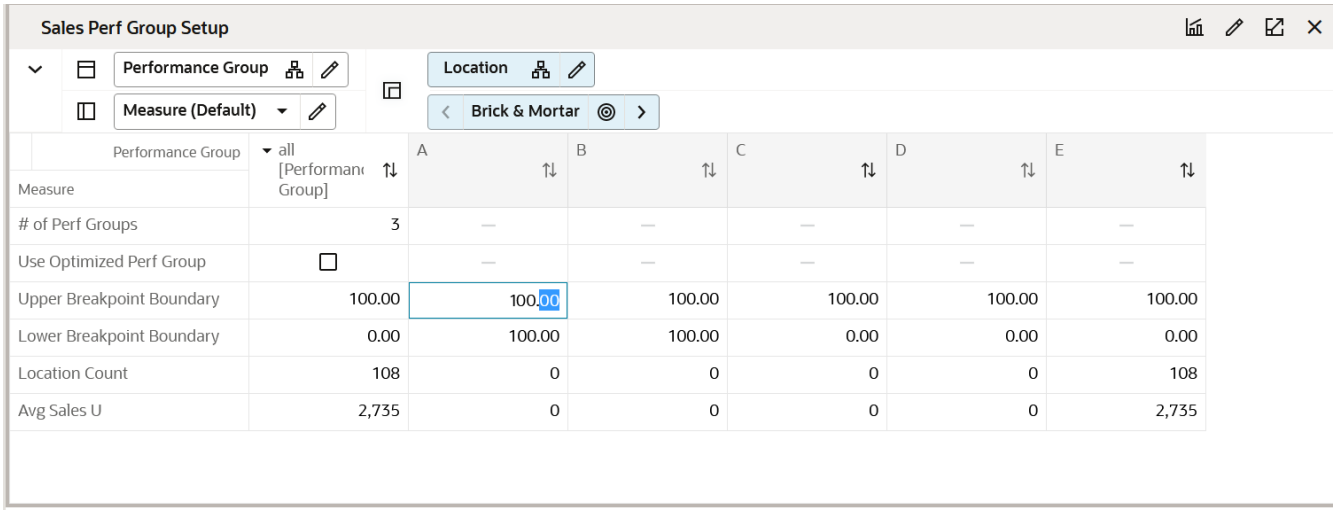
> **Note:**
>
> If you make changes to any settings, you must rerun the Create Cluster Application Action to see updated results.

If using the Optimized algorithm, the steps to complete this process:

- Enter the number of performance groups you want to create for the cluster, with a maximum of five available.
- Check the Use Optimized Perf Group Boolean flag.
- Review the Location Count and Avg Sales U for each performance group.
- Run the Optimize Clusters Application Action.
- Run the Create Cluster Application Action to create clusters.

> **Note:**
>
> If you make changes to settings, you must rerun the Optimize Clusters and Create Cluster Application Actions to see updated results.

Figure 6-6 Sales Perf Group Setup View



Measure	Performance Group: all [Performance Group]	A	B	C	D	E
# of Perf Groups	3	—	—	—	—	—
Use Optimized Perf Group	☐	—	—	—	—	—
Upper Breakpoint Boundary	100.00	100.00	100.00	100.00	100.00	100.00
Lower Breakpoint Boundary	0.00	100.00	100.00	0.00	0.00	0.00
Location Count	108	0	0	0	0	108
Avg Sales U	2,735	0	0	0	0	2,735

Measure Table

Table 6-5 Sales Perf Group Setup View Measures

Label	Definition
# of Perf Groups	A user-entered number used to calculate the number of performance-based clusters that will be created; the minimum is one and the maximum is five.
Use Optimized Perf Group	Enabling this checkbox selects the BaNG algorithm for use in location clustering.
Upper Breakpoint Boundary	The upper boundary of each performance group. When the upper boundary is edited, the lower boundary of the next performance group will recalculate. Note that user edits to the upper breakpoint will only be available in the current session and will not commit to the database.
Lower Breakpoint Boundary	The lower boundary of each performance group.
Location Count	The number of locations in each cluster. The number of locations by cluster will change if you select the Optimized or the Breakpoint algorithm methods or if you adjust the performance weights and recalculate using Application Actions. The total number of locations will always match the number of locations selected in the wizard process.
Avg Sales U	The average sales units for the performance group.

Measure Profile

Default Profile

The Default profile is used to define the number of performance groups and select and modify the clustering algorithm to be used.

Application Actions

Optimize Clusters

The Optimize Clusters Application Action signals the system to run the BaNG algorithm process to create clusters using the K-means science-based methodology.

Create Cluster

The Create Cluster Application Action calculates location clusters based on the user-defined parameters selected in the Initial Setup. If attributes, performance metric weights, # of performance groups, or the clustering method is updated, the Create Cluster Application Action must be rerun to see updated results.

Space Group Setup View

The Space Group Setup view will only be used if space-aware metrics (Avg # of fixtures, Fixture Capacity, Square Feet, Square Meter) are loaded into the solution by an Administrator.

The Space Group Setup view is used to define the number of space groups and select the algorithm used for clustering. The maximum amount of space groups is five and will be used with both the Breakpoint and Optimized algorithms.

To review the definitions of Breakpoint and Optimized, see Key Concepts

If using the Breakpoint algorithm, the steps to complete this process:

- Enter the number of space groups you want to create for the cluster, with a maximum of five available.
- Select the appropriate Space Source value from the Space Source drop-down list.
- Review the Upper Breakpoint Boundaries; adjust the upper boundaries if you have business knowledge that suggests a better result.
- Review the Location Count and Avg Space of each performance group.
- Run the Create Cluster Application Action to create clusters.

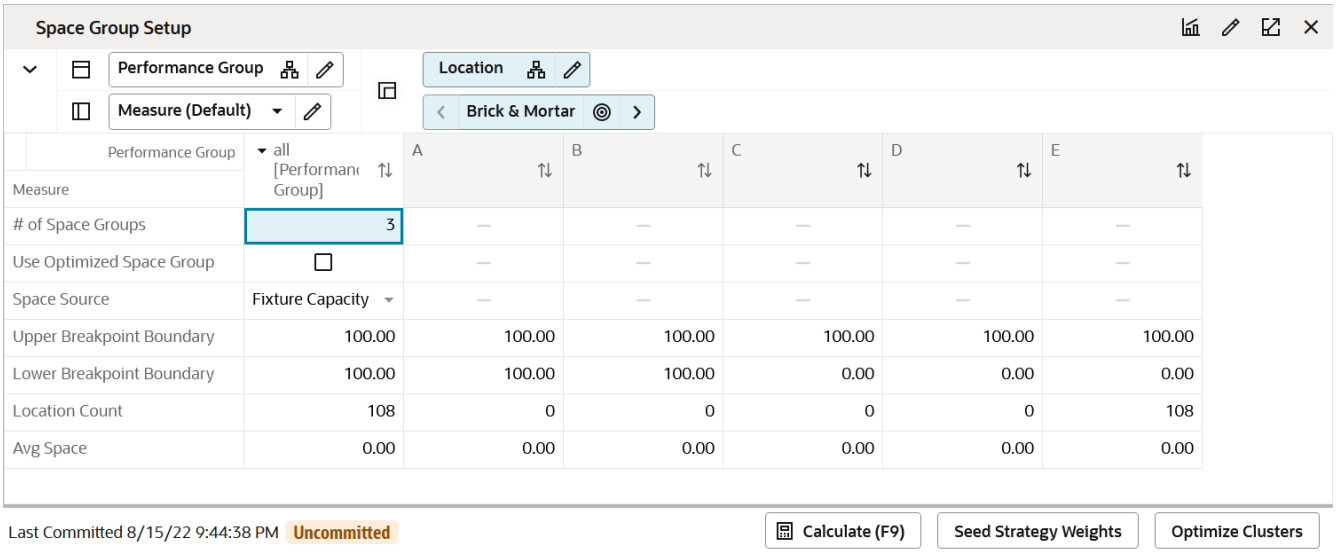
> **Note:**
>
> If you make changes to any settings, you must rerun the Create Cluster Application Action in order to see updated results.

If using the Optimized algorithm, the steps to complete this process:

- Enter the number of space groups you want to create for the cluster, with a maximum of five available.
- Check the Use Optimized Space Group Boolean.
- Select the appropriate Space Source value from the Space Source picklis.t
- Run the Optimize Clusters Application Action.
- Review the Location Count and Avg Space for each performance group.
- Run the Create Cluster Application Action to create clusters.

> **Note:**
>
> If you make changes to settings, you must rerun the Optimize Clusters and Create Cluster Application Actions in order to see updated results.

Figure 6-7 Space Group Setup View



Performance Group / Measure	all [Performance Group]	A	B	C	D	E
# of Space Groups	3	—	—	—	—	—
Use Optimized Space Group	☐	—	—	—	—	—
Space Source	Fixture Capacity	—	—	—	—	—
Upper Breakpoint Boundary	100.00	100.00	100.00	100.00	100.00	100.00
Lower Breakpoint Boundary	100.00	100.00	100.00	0.00	0.00	0.00
Location Count	108	0	0	0	0	108
Avg Space	0.00	0.00	0.00	0.00	0.00	0.00

Measure Table

Table 6-6 Space Group Setup View Measures

Label	Definition
# of Space Groups	A user-entered number used by the system to calculate clusters that will be created.
Use Optimized Space Group	Enabling this checkbox selects the BaNG algorithm for use in location clustering.
Space Source	Drop-down list for the user to decide which space metric to use in determining space-based clusters.
Upper Breakpoint Boundary	The upper boundary of each performance group. When the upper boundary is edited, the lower boundary of the next performance group will recalculate.
Lower Breakpoint Boundary	The lower boundary of each performance group.
Location Count	The number of locations in each cluster. The number of locations by cluster will change if you select the Optimized or the Breakpoint algorithm methods or if you adjust the performance weights and recalculate. The total number of locations will always match the number of locations selected in the wizard process.
Avg Space	The average space for each space group based on the user-selected Space Source.

Measure Profile

Default Profile

The Default profile is used to define the number of space groups and select and modify the clustering algorithm to be used.

Application Actions

Optimize Clusters

The Optimize Clusters Application Action signals the system to run the BaNG algorithm process to create clusters using the K-means science-based methodology.

Create Cluster

The Create Cluster Application Action calculates location clusters based on the user-defined parameters selected in the Initial Setup. If attributes, performance metric weights, # of performance groups, or the clustering method is updated, the Create Cluster Application Action must be rerun to see updated results.

Step 2: Analysis

The second step in the clustering process is Analysis. This step allows you to see location performance measures, Scaled Scoring, the related Performance Groups that each location scores into, and the cluster that the location has been assigned to. You can override the performance group a location has been assigned to based on your business knowledge; overriding a performance group will change the cluster the location is assigned to.

If using Space Groups to cluster locations, select the Space Group Analysis measure profile to view the Space scores, groups and clusters, and to make overrides as necessary.

The output of this step is a thoroughly analyzed and reviewed set of clusters, ready for approval.

> **Note:**
>
> The location attributes, as well as the like-location assignments for new locations were assigned in the Planning Administration segment.

The steps to complete this process:

- Review each location's cluster assignment to ensure you agree with it.
- If location clusters need adjusting, manually adjust or return to prior steps to make adjustments to attributes, performance measure weights, # of perf groups, or the clustering algorithm.

Tab and View in this Step:

- **Analysis Tab**:
  - Location View

Application Action

Create Cluster

The Create Cluster Application Action calculates location clusters based on the user-defined parameters selected in the Initial Setup. If attributes, performance metric weights, # of performance groups, or the clustering method is updated, the Create Cluster Application Action must be rerun to see updated results.

Analysis Tab

This tab is used to analyze the location performance measures, scaled scoring, performance groups, and clusters assigned to each location.

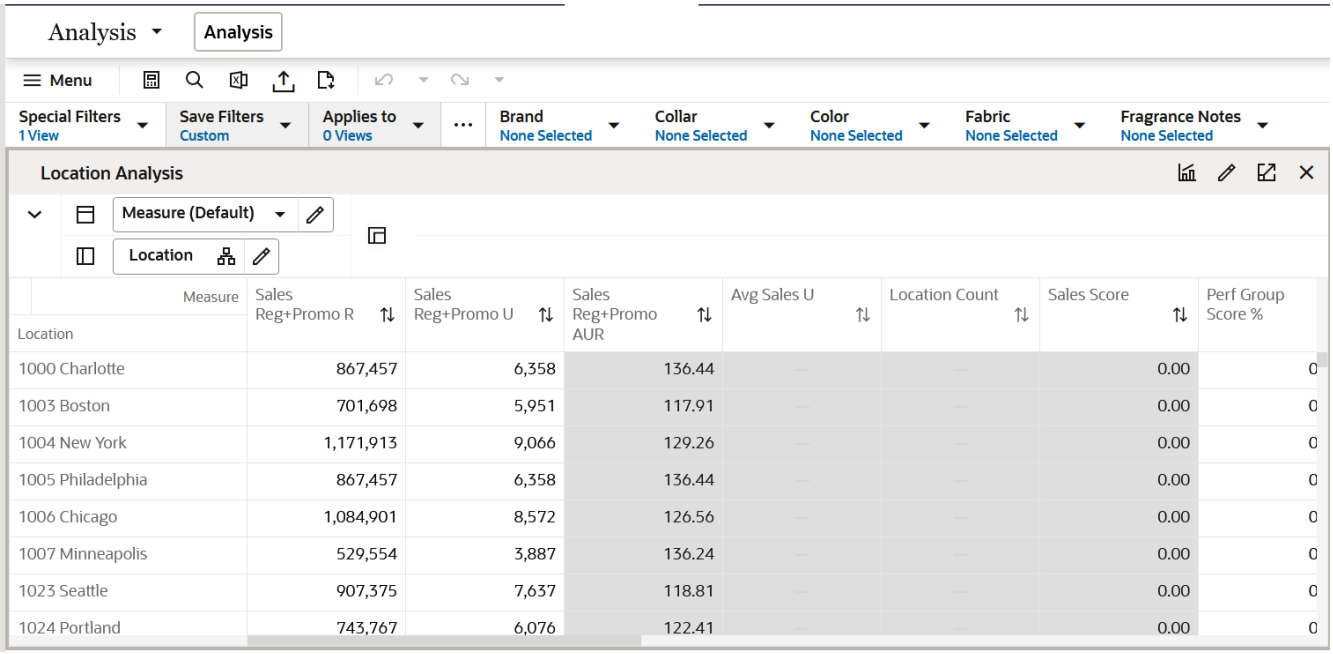
Location Analysis View

The steps to complete this process:

- Review the cluster assignments to ensure you agree.
- If you do not agree with the cluster assignment, you have several options:
  - Override the performance group assignment in the Override Perf Group measure. For example, if a location was ranked as B, you can manually override it to an A or a C, based on your business knowledge.
  - Return to the Setup step to:
    * Adjust performance measures. For example, you could change the performance measure of Sales U to Sales R. Keep in mind that the measures being used should correspond to the category strategy.
    * Adjust performance weights. For example, you could change the weights that are assigned to Sales U to Sales R. Keep in mind that the weights and measures being used should correspond to the category strategy.
    * Adjust the number of performance groups. For example, you could increase or decrease the number of performance-based clusters. This will increase or decrease the number of clusters created.
    * Adjust the location attributes used in clustering. For example, you could choose a different combination of attributes or remove an attribute if you deem it unimportant after analyzing the results.

> **Note:**
>
> If you make changes to settings, you must rerun the Optimize Clusters (if using the Optimize algorithm) and Create Cluster Application Actions to see updated results.

Figure 6-8 Location Analysis View



Measure Table

Table 6-7 Location Analysis View Measures

Label	Definition
Sales R, U, AUR	Sales Retail, Sales Units, Sales AUR based on wizard selections.
Avg Sales U	The average sales units for all locations based on wizard selections. Viewable when all[Location] is selected in outline mode.
Location Count	The numerical count of locations included in a cluster based on wizard selection.
Sales Score	The Scaled Scoring score, based on weights for Sales Retail, Sales Units, Sales AUR, Gross Margin R, and Gross Margin R %. The Scaled Scoring values work with the breakpoints to determine the performance group to which the location belongs.
Perf Group Score %	The Perf Group Score % ranks each location by its performance against its peers and lets you know how much better or worse it's performing relative to all locations in the cluster. The lowest performing store is 0% and the highest performing store is 100%.
Perf Group	The performance group each location would fall under if the Breakpoint algorithm was selected.
Perf Group (Optimized)	The performance group each location would fall under if the Optimized algorithm was selected.
Override Perf Group	Shows the performance group if the planner manually overrides the cluster assignment of individual locations. If you use the override, you must rerun the Create Cluster Application Action to update cluster results.
Location Attribute 1, 2, 3	Shows attribute 1, 2, 3 chosen in the Initial Setup Step.
Cluster	Shows the cluster based on the attributes selected in prior steps.

Measure Profiles

Default Profile

The Default profile is used to analyze, review and make adjustments to cluster assignments.

Sales Performance Analysis

The Sales Performance Analysis profile is used to analyze sales and gross margin measures by cluster to understand the financial rollups of the proposed clusters. A thorough understanding of the financial metrics related to each cluster is an important factor before approving clusters.

Space Group Analysis Profile

The Space Group Analysis profile is used to analyze, review and make adjustments to cluster assignments that are based on space metrics.

Standard Deviation Profile

The standard Deviation Profile is used to review and analyze the performance of each store in comparison with the average performance of all stores at the cluster and higher levels. This will help a retailer to decide if low performing stores should receive tighter as compared to other stores with average or good performance.

Step 3: Approval

The third and final step in the clustering process is Approval. This step approves the location clusters that you have created, analyzed, and reviewed for accuracy.

The output of this step is an approved set of clusters, for use in Assortment Maintenance when assigning a cluster to an Assortment Period.

The steps to complete this process:

- Approve clusters.
- Review cluster versions, if necessary.

Tabs and Views in this Step:

- **Approve Tab**:
  - Final Cluster Review View
  - Approve View
- **Review Cluster Versions Tab**:
  - Approved Cluster View

Application Actions

Approve

The Approve Application Action creates a version of clusters that can be used to assign to an Assortment Period in Assortment Maintenance. Multiple versions of clusters can be approved, to be reused and assigned to different Assortment Periods. You select which version to approve to before running the Approve Application Action.

Refresh Cluster Version

The Refresh Cluster Version Application Action displays the version selected in the Cluster Version drop-down list measure. It is used to dynamically update the clusters in order to view different approved versions.

Approve Tab

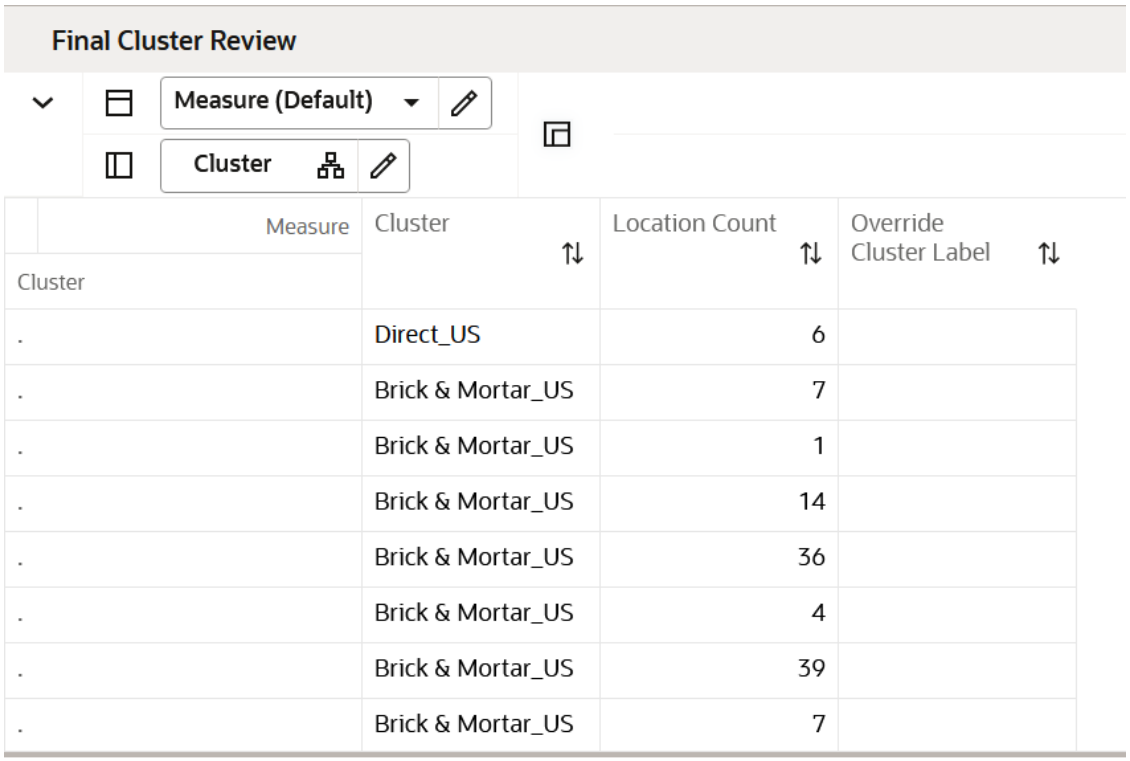
The Approve tab is used to select a version to approve the clusters to, define a cluster label if desired, and enter comments as necessary.

Final Cluster Review View

The steps to complete this process:

- Review the location count by each cluster.
- In Override Cluster Label, you can enter new a label name for clusters, if desired:
  - The cluster label can be used to identify the attributes of the cluster.
  - If you use the Override Cluster label, you must run the Approve Application Action after the labels are entered.

Figure 6-9 Final Cluster Review View



Measure Cluster	Cluster	Location Count	Override Cluster Label
.	Direct_US	6	
.	Brick & Mortar_US	7	
.	Brick & Mortar_US	1	
.	Brick & Mortar_US	14	
.	Brick & Mortar_US	36	
.	Brick & Mortar_US	4	
.	Brick & Mortar_US	39	
.	Brick & Mortar_US	7	

Measure Table

Table 6-8 Final Cluster Review View Measures

Label	Definition
Cluster	Displays the attributes that comprise the cluster.
Location Count	Displays the number of locations in each cluster.
Override Cluster Label	Optional user input field to rename a cluster. If a label override is used, the user input name will be seen in wizard selections and segments that contain the cluster.

Measure Profile

Default Profile

The Default profile is used to rename each cluster for easier identification.

Approve View

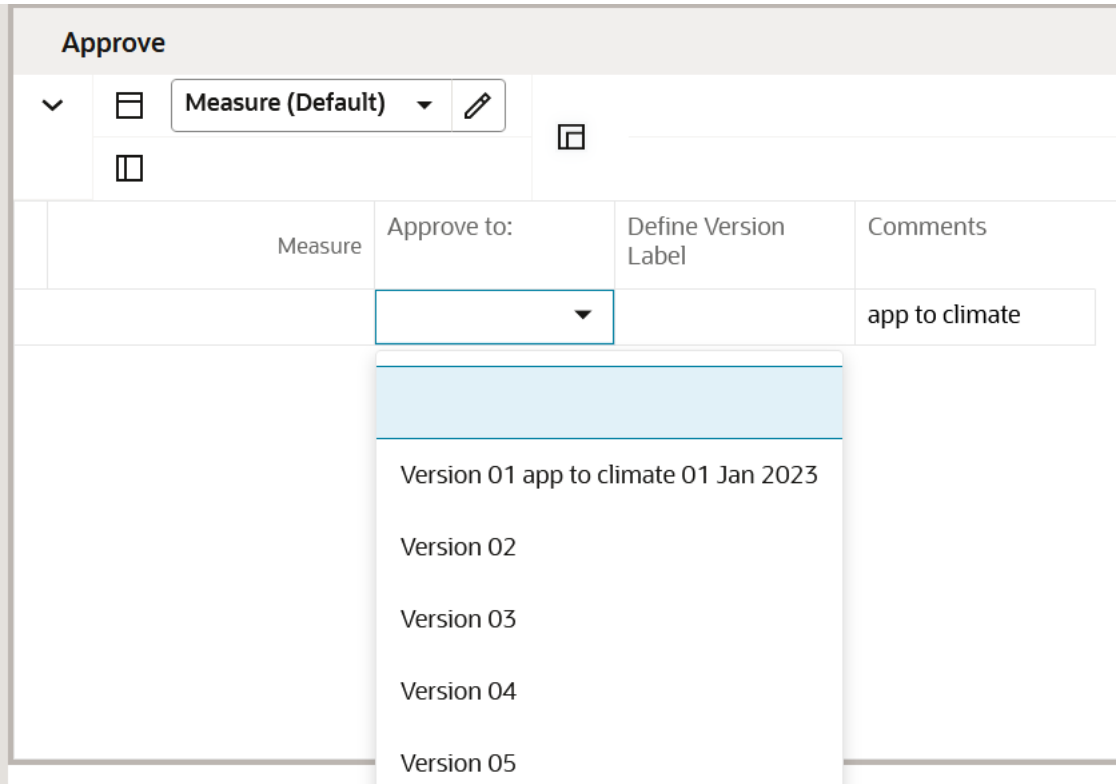
The steps to complete this process:

- In the Approve To measure drop-down list, select the version you wish to approve to:
  - The ability to have multiple versions of clusters allows you to have a library of versions that can be assigned to different Assortment Periods.
  - If a cluster version has already been used, you may override its contents by selecting and running the Approve Application Action.

    Unused cluster versions will have this naming convention: Version01, Version02, and so on.
- I n Define Version Label, you can enter a new label for the version, if desired.

  The version label can be used to identify the attributes of the version for easier identification when assigning the version in Assortment Maintenance.
- Run the Approve Application Action.

Figure 6-10 Approve View



Measure Table

Table 6-9 Approve View Measures

Label	Definition
Approve to:	Drop-down list to select which version to approve clusters to. If the version has not been used yet, it will show Version 1, Version 2, Version 3, Version 4 and Version 5. If a version has been used, it will show an approved cluster version label. You can select a version that has been used and reapprove a new set of clusters which will override the prior clusters.
Define Version Label	Optional user input field to rename a version. If a label override is used, the user input name will be seen in wizard selections and segments that contain the cluster version.
Comments	Comments entered here will appear as a reference in the Assortment Maintenance task.

Measure Profile

Default Profile

The Default profile is used to approve clusters as well as optionally rename the version and enter comments.

Application Action

Approve

The Approve Application Action creates a version of clusters that can be used to assign to an Assortment Period in Assortment Maintenance. Multiple versions of clusters can be approved, to be reused and assigned to different Assortment Periods. You select which version to approve to before running the Approve Application Action.

Review Cluster Versions Tab

The Review Cluster Versions tab is used to provide an overview of all available cluster versions.

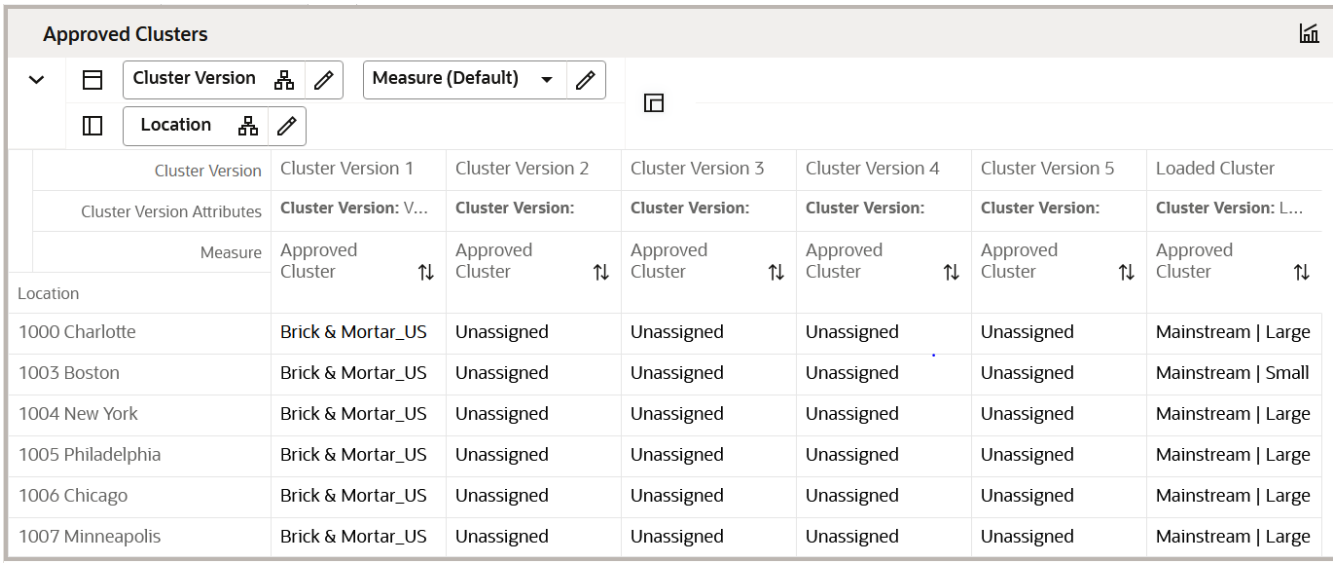
Approved Cluster View

Use the Approved Clusters view to provide visibility to all cluster versions that have been created for the category. You can compare how different locations are classified in the different cluster versions.

The step to complete this process:

- Review cluster versions.

Figure 6-11 Approved Clusters View



Cluster Version	Cluster Version 1	Cluster Version 2	Cluster Version 3	Cluster Version 4	Cluster Version 5	Loaded Cluster
Cluster Version Attributes	Cluster Version: V...	Cluster Version:	Cluster Version:	Cluster Version:	Cluster Version:	Cluster Version: L...
Measure	Approved Cluster	Approved Cluster	Approved Cluster	Approved Cluster	Approved Cluster	Approved Cluster
Location						
1000 Charlotte	Brick & Mortar_US	Unassigned	Unassigned	Unassigned	Unassigned	Mainstream | Large
1003 Boston	Brick & Mortar_US	Unassigned	Unassigned	Unassigned	Unassigned	Mainstream | Small
1004 New York	Brick & Mortar_US	Unassigned	Unassigned	Unassigned	Unassigned	Mainstream | Large
1005 Philadelphia	Brick & Mortar_US	Unassigned	Unassigned	Unassigned	Unassigned	Mainstream | Large
1006 Chicago	Brick & Mortar_US	Unassigned	Unassigned	Unassigned	Unassigned	Mainstream | Large
1007 Minneapolis	Brick & Mortar_US	Unassigned	Unassigned	Unassigned	Unassigned	Mainstream | Large

Measure Table

Table 6-10 Approved Clusters View Measures

Label	Definition
Approved Cluster	Displays the names of approved clusters.
Location Count	Displays the number of locations in the cluster.

Measure Profile

Default Profile

The Default profile is used to display approved clusters and the location count in the cluster.

7
Assortment Period Maintenance

The Assortment Period Maintenance task is used to assign weeks to Assortment Periods and assign location clusters to Assortment Periods, mapping the last assortment weeks, as well as analyzing the locations by clusters, and viewing the assortment periods by calendar.

Typical Business Users

The typical user of the Assortment Maintenance task is an assortment planner who has business knowledge of which location clusters should be assigned to which Assortment Periods and which weeks should be assigned to each Assortment Period. You can assign a start week and an end week for different style colors with the assortment period in the create options section of Assortment Planning. If you do not specify the start and end week, then the beginning of the assortment period is considered as the start week and the end of the assortment period is considered as the end week for the assorted style colors.

Data Requirements

- Approved location clusters

Assortment Maintenance Process Steps

The high-level steps to complete this process:

- Assign weeks to Assortment Periods.
- Assign a maximum initial receipt lead time.
- Assign a cluster version to an Assortment Period.
- Map last assortment weeks.
- View Assortment Periods by calendar.
- View clusters by location.

Create the Assortment Maintenance Segment

To create the Assortment Maintenance segment:

1. Click **Assortment Services** in the Task menu. Then, click the Planning Administration activity and then the Assortment Period Maintenance task.
2. The dialog to create New Plan opens. Click **Create New Plan**.
3. Enter the Plan Label in the text field. Click **Ok**.
4. In Select Product, select one or multiple departments and click **Finish**.

   The Assortment Maintenance segment is built.

Step 1: Assortment Period Maintenance

The first and only step in the Assortment Maintenance process is to assign weeks to a cluster, assign a cluster version to an Assortment Period, and assign the maximum receipt lead time. You can also view assortment periods by calendar and location clusters by calendar. It is advisable that multiple departments planned together should have the same assortment period for accurate planning.

The steps to complete this process:

- Assign a cluster version to an Assortment Period.
- View an Assortment Period and its associated quarter.
- View a cluster version and its associated quarter.

Tab and Views in this Step:

- **Assortment Period Maintenance Tab:**
  - Define Assort periods View
  - Assort Periods by Calendar View
  - Clusters By Location View

Assortment Period Maintenance Tab

This tab is used to define assortment periods and review the assortment periods by calendar and location.

Define Assort Periods View

The Define Assort Periods view is used to assign weeks to an Assortment Period and to assign a cluster version to an Assortment Period.

The steps to complete this process:

- In the Define Label measure field, input a name for the Assortment Period that makes business sense to identify the Assortment Period.

  This label will be shown in the Assortment Services wizards when selecting Assortment Periods.
- In the Start Date measure, enter or select the first week of the Assortment Period.

  The Start Week measure will populate.
- In the Duration (Weeks) measure, enter the number of weeks of the Assortment Period.

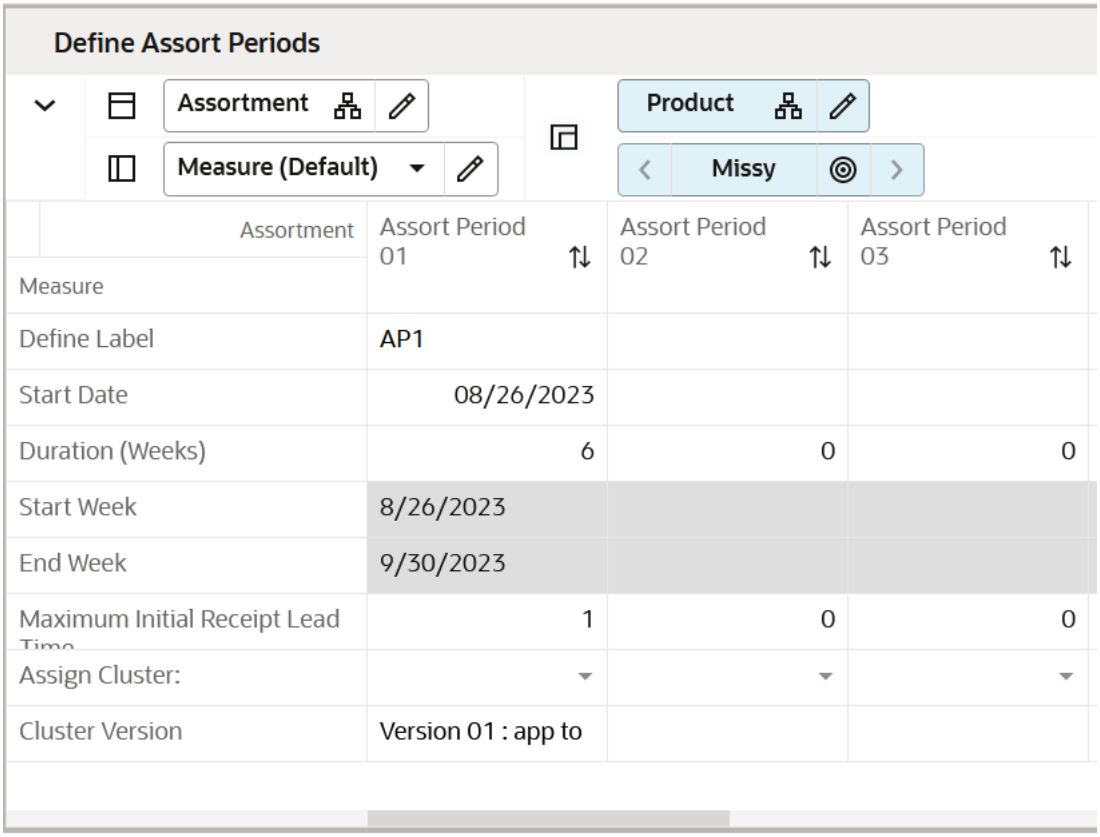
  The End Week measure will populate.
- In the Maximum Initial Receipt Lead Time measure, enter the maximum number of weeks that receipts can be received before the start of the Assortment Period.

  Within the Item Planning segment, you will be able to choose which week the receipts should arrive before the start week of the assortment period, up to the maximum that is set here.
- In the Assign Cluster measure drop-down list, select the appropriate cluster version and assign it to the Assortment Period.

- Run the Assign Cluster Application Action.
- Run the Approve Application Action.

Note that weeks may not overlap between Assortment Periods, and a real-time alert will appear if they do. You must resolve the alert before data will be committed to the database.

Figure 7-1 Define Assort Periods View



Measure Table

Table 7-1 Define Assort Periods View Measures

Label	Definition
Define Label	A user-entered label for an Assortment Period. The label will be visible in the Item Planning wizard when selecting Assortment Periods to help the planner identify the correct Assortment Period to plan.
Start Date	The first date of the Assortment Period.
Duration (Weeks)	The number of weeks in the Assortment Period.
Start Week	The first week of the Assortment Period, calculated from the Start Date and the Duration entered.
End Week	The last week of the Assortment Period, calculated from the Start Date and the Duration entered.
Maximum Initial Receipt Lead Time	The maximum number of weeks for initial receipt lead time (before the Start Week that the initial receipts arrive).

Table 7-1 (Cont.) Define Assort Periods View Measures

Label	Definition
Assign Cluster	A drop-down list measure populated with approved cluster versions. It is used to select the appropriate version to assign to an Assortment Period.
Cluster Version	Reference measure that is populated after running the Assign Cluster Application Action with the cluster version assigned to an Assortment Period.

Application Actions

Assign Cluster

The Assign Cluster Application Action copies the selected cluster version to the assortment period selected, populating the Cluster Version measure with the cluster version name for reference.

Approve

The Approve Application Action commits data to the database, first checking that there are no real-time alerts that are unresolved.

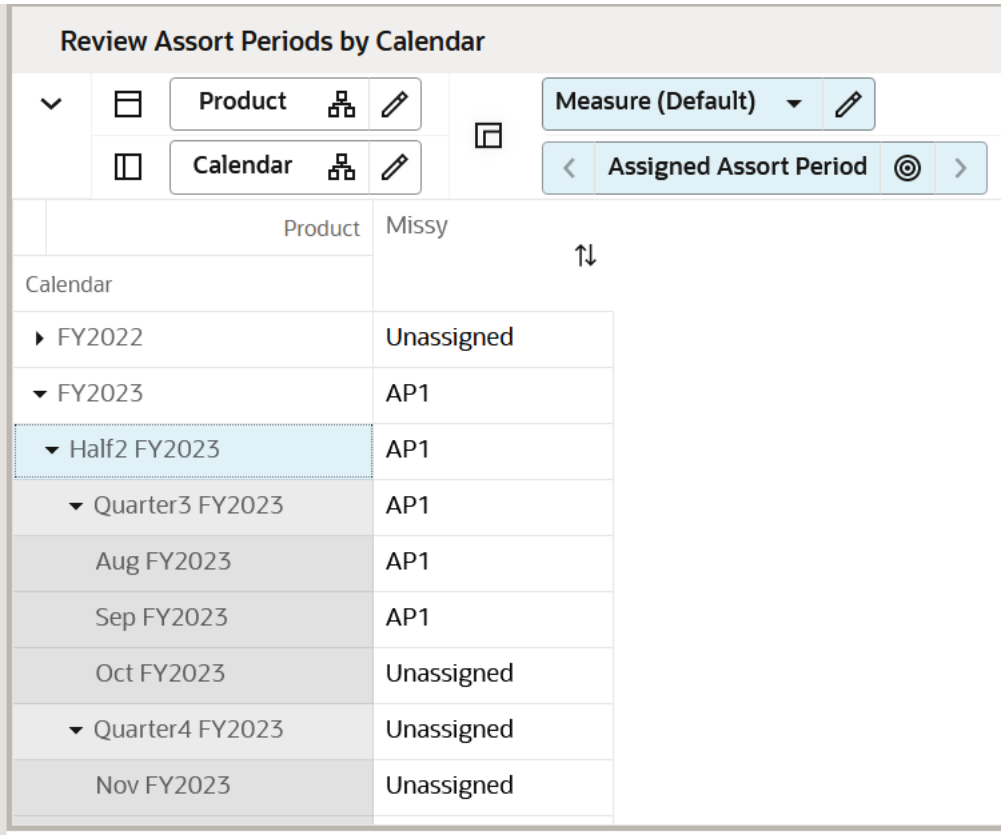
Assort Periods by Calendar View

The Assort Periods by Calendar view is used for reference purposes only, to allow you to view the assortment periods by different levels of the calendar hierarchy (week, month, quarter, half, year). It provides visibility to how the Assortment Periods line up to the dates in the calendar.

The step to complete this process:

- View Assortment Periods by category, week, month, quarter, half, or year, as desired.

Figure 7-2 Assort Periods by Calendar View



Measure Table

Table 7-2 Assort Periods by Calendar View Measure

Label	Definition
Assigned Assort Period	Used to view Assortment Period assignment to the calendar hierarchy.

Clusters By Location View

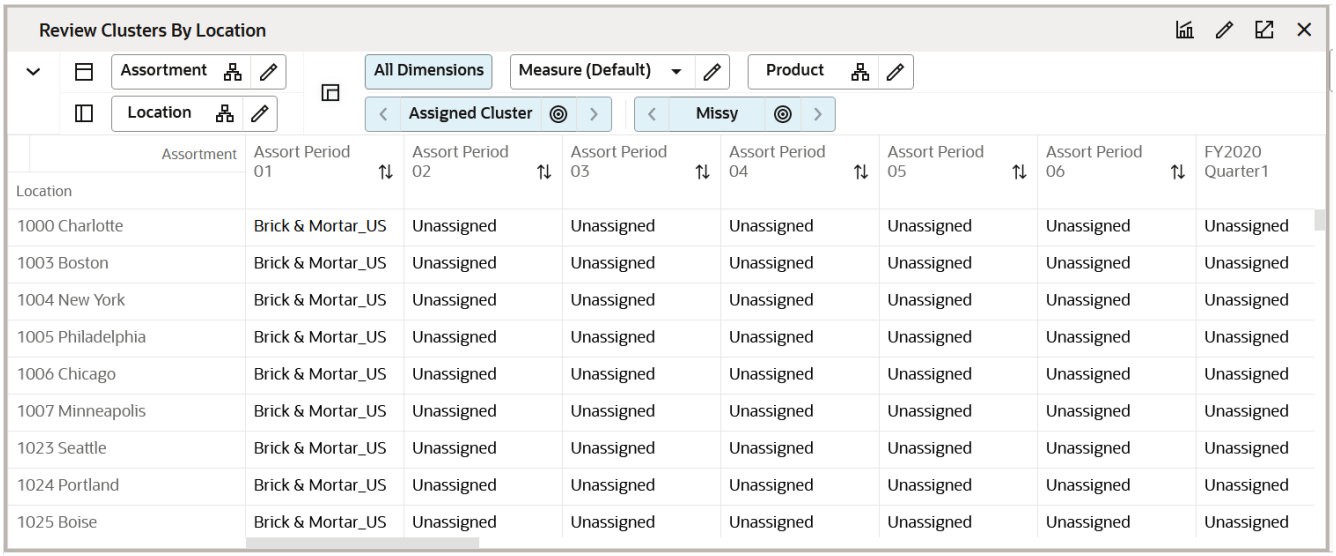
The Clusters by Location view is used for reference purposes only, to allow you to view how locations are assigned to different clusters during different Assortment Periods.

The steps to complete this process:

- Using the Assigned Cluster measure, view each location's cluster assignments by department and Assortment Period, as desired.
- Using the Store to Cluster Prerange by Period measure, view each location's assignment to an Assortment Period, as desired.

Note that if a Location appears as Unassigned, it will not be available for selection in Assortment Planning, as it means the location does not belong to a cluster.

Figure 7-3 Clusters By Location View



Location \ Assortment	Assort Period 01	Assort Period 02	Assort Period 03	Assort Period 04	Assort Period 05	Assort Period 06	FY2020 Quarter1
1000 Charlotte	Brick & Mortar_US	Unassigned	Unassigned	Unassigned	Unassigned	Unassigned	Unassigned
1003 Boston	Brick & Mortar_US	Unassigned	Unassigned	Unassigned	Unassigned	Unassigned	Unassigned
1004 New York	Brick & Mortar_US	Unassigned	Unassigned	Unassigned	Unassigned	Unassigned	Unassigned
1005 Philadelphia	Brick & Mortar_US	Unassigned	Unassigned	Unassigned	Unassigned	Unassigned	Unassigned
1006 Chicago	Brick & Mortar_US	Unassigned	Unassigned	Unassigned	Unassigned	Unassigned	Unassigned
1007 Minneapolis	Brick & Mortar_US	Unassigned	Unassigned	Unassigned	Unassigned	Unassigned	Unassigned
1023 Seattle	Brick & Mortar_US	Unassigned	Unassigned	Unassigned	Unassigned	Unassigned	Unassigned
1024 Portland	Brick & Mortar_US	Unassigned	Unassigned	Unassigned	Unassigned	Unassigned	Unassigned
1025 Boise	Brick & Mortar_US	Unassigned	Unassigned	Unassigned	Unassigned	Unassigned	Unassigned

Measure Table

Table 7-3 Clusters By Location View Measures

Label	Definition
Assigned Cluster	Used to view each store's cluster assignment by Assortment Period.
Location to Cluster Prerange by Period	Used to view each store's assignment to an Assortment Period.

8
Curve Maintenance

The Curve Maintenance task is used to create a sales curve library for use in Item Planning. The curves are used to spread unit sales to week, based on percent-to-total sales. They shrink or stretch to fit the defined regular or promotional sales period.

Typical Business Users

The typical user of the Curve Maintenance task is an assortment planner who has business knowledge of the seasonality and selling patterns to create curves to assign to Assortment Periods.

Data Requirements

- Approved location clusters
- Approved assortment period

Curve Maintenance Process Steps

The high-level steps to complete this process:

- Define curves to be used to spread sales to week.
- Approve curves.

Create the Curve Maintenance Segment

To create the Curve Maintenance segment:

1. Click **Assortment Services** in the Task menu. Then, click the Planning Maintenance activity and then the Curve Maintenance task.
2. The dialog to create New Plan opens. Click **Create New Plan**.
3. Enter the Plan Label in the text field. Click **Ok**.
4. In Select Product, select one or multiple departments and click **Next**.
5. In Select Assortment Period, select the Assortment Period to assign curves and click **Finish**.

   To see the user-defined Assortment Period label, click the Dimension tile and select Assortment Label.

> **Note:**
>
> Assortment Labels can vary by Sub-class. If multiple subcategories are selected, the label shown will be based on the first order Sub-class.

The Curve Maintenance segment is built.

Step 1: Define Curves

The first step in the Curve Maintenance process is to set curve parameters and define the curves.

The steps to complete this process:

- Select a curve seed source and seed timeframe. See Define Parameters View
- Select whether the curve will shrink to fit or remain static over the number of weeks. See Define Curves View

Tab and Views in this Step:

- **Define Curves Tab:**
  - Define Parameters View
  - Define Curves View
  - View Sales Source View

Application Action

Seed Curve

The Seed Curve Application Action references the selected Seed Source and Curve Source (Year) measures selected by you to populate a sales curve as a starting point for the planning.

Define Curves Tab

This tab is used to seed and define curves.

Define Parameters View

The Define Parameters view is used to select a curve source year, a seed source, and the curve type.

The steps to complete this process:

- The Curve Description measure allows you to provide a detailed curve label for the curves defined so that you can easily identify the specific curves defined for different use cases.
- In the Curve Source (Year) measure, select the year from which to pull the Seed Source data.
- In the Seed Source measure, select MFP, Forecast or Actuals as the seed source.

  The Seed Source measure selected should align with the Curve Source (Year) selected. For example, if you select Forecast, the Curve Source (Year) should be a future period. If you select Actuals, the Curve Source (Year) should be an elapsed period.
- You may also directly enter a curve, without using one of the available seed sources (see "Define Curves View"):
  - For example, you can manually enter an 8–week curve, starting with W01 and going through W08.
  - The system will normalize these values to 100%.

  - If you manually enter a curve, select the Relative Curve type so that the curve will resize according to the assortment duration.
- In the Curve Type measure, select Absolute or Relative:
  - Absolute will take the corresponding week's curve percent to total and normalize the curve to equal 100% based on the assortment period duration.

    Absolute curves are not stretched or shortened to fit the assortment period and can be useful when items tend to display seasonal behavior based on the time of year.

    An absolute curve will only normalize the data to make it 100%. It just changes the scale, retaining the shape of the curve.
  - Relative will take the first through the last populated week curve percent and resize, then normalize the curve to equal 100% to fit the assortment period duration. For example, if the assortment period is longer than the defined curve, the effective curve is stretched to match the assortment period.

    Relative curves are useful if the items tend to display the same pattern of selling over their lifecycle, regardless of the time period.

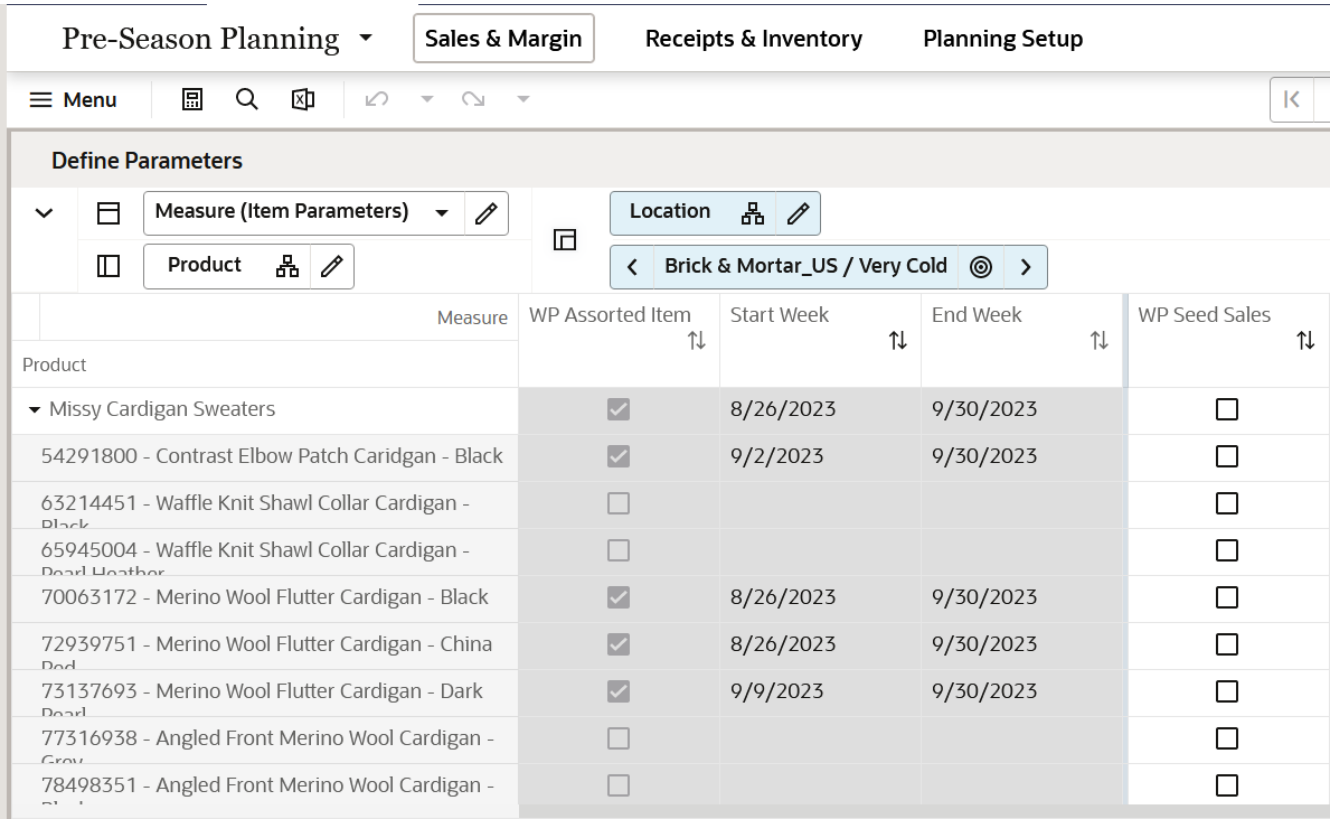
    A relative curve is useful when you do not want to enter data for all the weeks in the Define Curves view. As an example, if you have an assortment period of 12 weeks, you can just set data for week1 to week4 and the system will resize it to fit into the assortment period.

    You can also set data for more than 12 weeks for this scenario; the relative setup will take the curve and fit it for 12 weeks.

    You need to remember that the relative curve resizes for forward weeks only. Ideally, you should set data from week1 up to any week you decide to. If you do not set data for week1 but set data only from week2, the relative curve will only be set from week2, so effectively week1 will not have any sales. The curve will not adjust for any past week.
- Run the Seed Source Application Action.

> **Note:**
>
> Seed Source will populate the Sales Curve % based on the seed source independent of the Curve Type defined. If the seeded curve % has curve data from week01 to week52 and type is set to Relative, it will resize and normalize it to the length of the Assortment Period. The resize and normalization of the curve occurs in the normal calc process and not through the Seed Curve custom menu. The decision to use which Curve Type, Absolute versus Relative, can happen after the Seed Curve process. Relative is best used for the manual setting of Sales Curve % from week01 onwards.

Figure 8-1 Define Parameters View



Measure Table

Table 8-1 Define Parameters View Measures

Label	Definition
Curve Description	The string measure to hold the detail curve label to be able to easily identify the curve for specific business use cases.
Curve Source (Year)	The year from which to pull the Seed Source data.
Seed Source	A drop-down list measure to select a data source from which to populate curves.
Curve Type	A drop-down list measure to select the curve type of Absolute or Relative. Absolute curves correspond to the percent to total sales of the corresponding week in the Assortment Period while Relative curves are shortened or lengthened to match the Assortment Period length.

Define Curves View

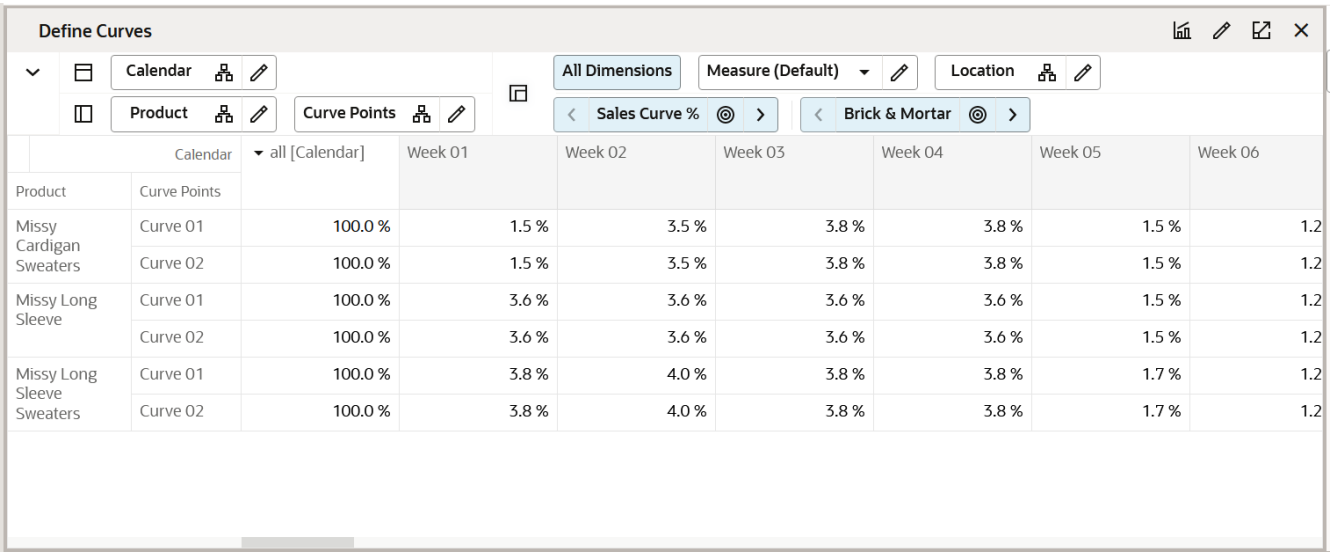
The Define Curves view is used to view and modify the seeded curve data. Note that all curves will systematically normalize to equal 100%. You have the option of directly entering curves as well. When entering directly, the recommended curve type is Relative.

The steps to complete this process:

- Review each of the defined curves and determine if adjustments should be made.

- It can be helpful to view the curves in graph form to see the shape of the curve in a visual format.
- In the Define Curves view, you are presented with week01 to week53. These are all generic weeks. Do not mistake it for FY weeks. These are relative weeks to the assortment period selected by you. For example, you can have an assortment period from week13 to week24. In Define Curves, it will map week01 to week13 of the assortment period (and onwards).

Figure 8-2 Define Curves View



Calendar		all [Calendar]	Week 01	Week 02	Week 03	Week 04	Week 05	Week 06
Product	Curve Points							
Missy Cardigan Sweaters	Curve 01	100.0 %	1.5 %	3.5 %	3.8 %	3.8 %	1.5 %	1.2
	Curve 02	100.0 %	1.5 %	3.5 %	3.8 %	3.8 %	1.5 %	1.2
Missy Long Sleeve	Curve 01	100.0 %	3.6 %	3.6 %	3.6 %	3.6 %	1.5 %	1.2
	Curve 02	100.0 %	3.6 %	3.6 %	3.6 %	3.6 %	1.5 %	1.2
Missy Long Sleeve Sweaters	Curve 01	100.0 %	3.8 %	4.0 %	3.8 %	3.8 %	1.7 %	1.2
	Curve 02	100.0 %	3.8 %	4.0 %	3.8 %	3.8 %	1.7 %	1.2

Measure Table

Table 8-2 Define Curves View Measures

Label	Definition
Sales Curve %	Used to hold the weekly sales percent to total of a particular curve.
Curve Duration	Used to display the number of weeks in each curve.

View Sales Source View

The View Sales Source view is used to view the MFP, Forecast, and Actual sales data that the curves are based upon in the selected Curve Source (Year). It is used as a reference view only.

The step to complete this process:

- Review the data sources used to create curves, as necessary.

Figure 8-3 View Sales Source View

View Sales Source

Calendar | Product | Measure (Default) | Location | Brick & Mortar

Product	Measure	all [Calendar]	Week 01	Week 02	Week 03	Week 04	Week 05
Missy Cardigan Sweaters	MFP Sales U	60,820	889	2,139	2,285	2,296	941
	MFP Sales Curve U %	100.0 %	1.5 %	3.5 %	3.8 %	3.8 %	1.5 %
	Fcst Sales U	36,203	1,740	1,847	1,809	1,816	1,740
	Fcst Sales Curve U %	100.0 %	4.8 %	5.1 %	5.0 %	5.0 %	4.8 %
	Actual Sales Curve U	0	0	0	0	0	0
	Actual Sales Curve U %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Missy Long Sleeve	MFP Sales U	257,524	9,198	9,296	9,190	9,282	3,958
	MFP Sales Curve U %	100.0 %	3.6 %	3.6 %	3.6 %	3.6 %	1.5 %
	Fcst Sales U	148,622	7,615	7,658	7,601	7,611	7,164

Measure Table

Table 8-3 View Sales Source View Measures

Label	Definition
MFP Tgt, Fcst, Actual Sales U	MFP CP, Forecast and Actual Sales Units for the selected Curve Source (Year).
MFP Tgt, Fcst, Actual Sales Curve U %	MFP CP, Forecast and Actual Sales Curve Unit % for the selected Curve Source (Year). The Sales Curve Unit percent corresponds to the sales unit percent to total.

Step 2: Curve by Assortment

The second step in the Curve Maintenance process is to approve the curves and view the approved curves by Assortment Period and by week.

The steps to complete this process:

- Approve curves.
- View the approved curves.
- View the assortment period.
- View the curve by assortment.

Tab and Views in this Step:

- **Curve by Assortment Tab:**
  - Approve View
  - View Assort Period View
  - View Curve by Assortment View

Application Action

Approve

The Approve Application Action is used to approve the curve library for the Subclass, Assortment Period, and channel.

Curve by Assortment Tab

This tab is used to approve the curves and view them by assortment period and week.

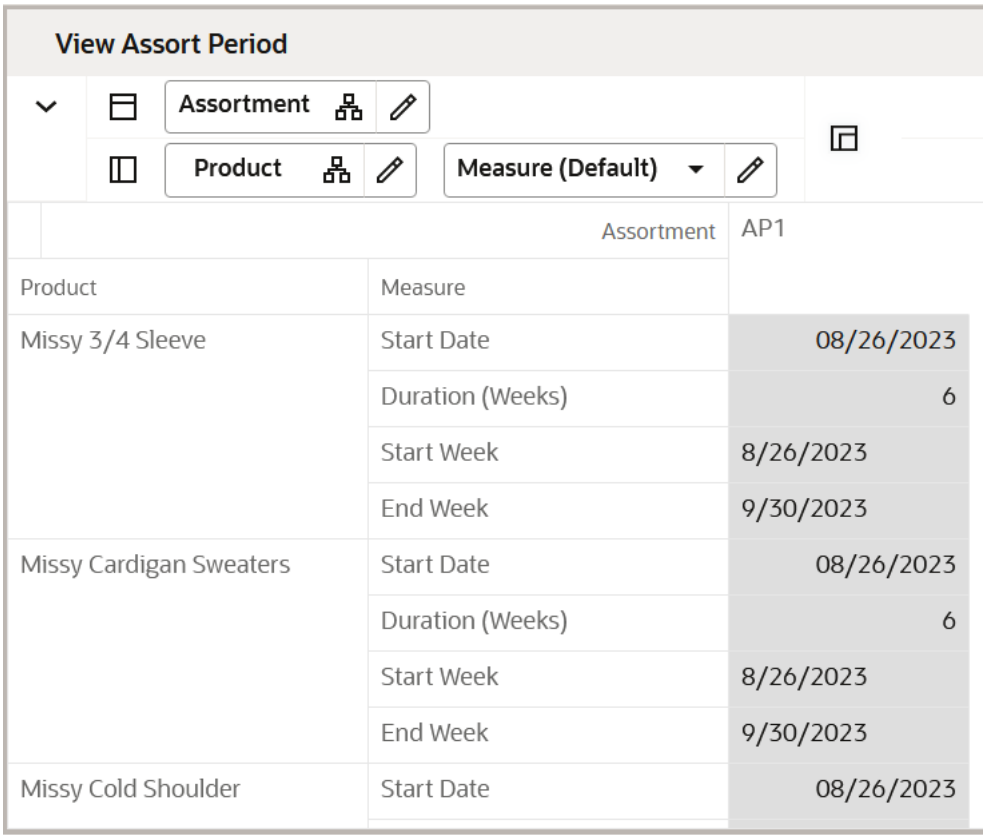
Approve View

The Approve view is used to approve the curve library for the Subclass, Assortment Period, and channel.

The steps to complete this process:

- Flag the Approve Boolean measure for each Subclass.
- Run the Approve Application Action.

Figure 8-4 Approve View



Measure Table

Table 8-4 Approve View Measures

Label	Definition
Approve	Boolean flag to indicate that a curve library should be approved. The Approve Application Action must be run after flagging the measure.

View Assort Period View

The View Assort Period view is used to view the Assortment Period dates. This is a reference-only view.

The step to complete this process:

- Review the Assortment Period dates.

Measure Table

Table 8-5 View Assort Period View Measures

Label	Definition
Start Date	The first date of the Assortment Period.
Duration (Weeks)	The number of weeks in the Assortment Period.
Start Week	The first week of the Assortment Period, calculated from the Start Date and Duration entered.
End Week	The last week of the Assortment Period, calculated from the Start Date and Duration entered.

View Curve by Assortment View

The View Curve by Assortment view is used to view the curve library by Assortment Period and Subclass. This is a reference-only view.

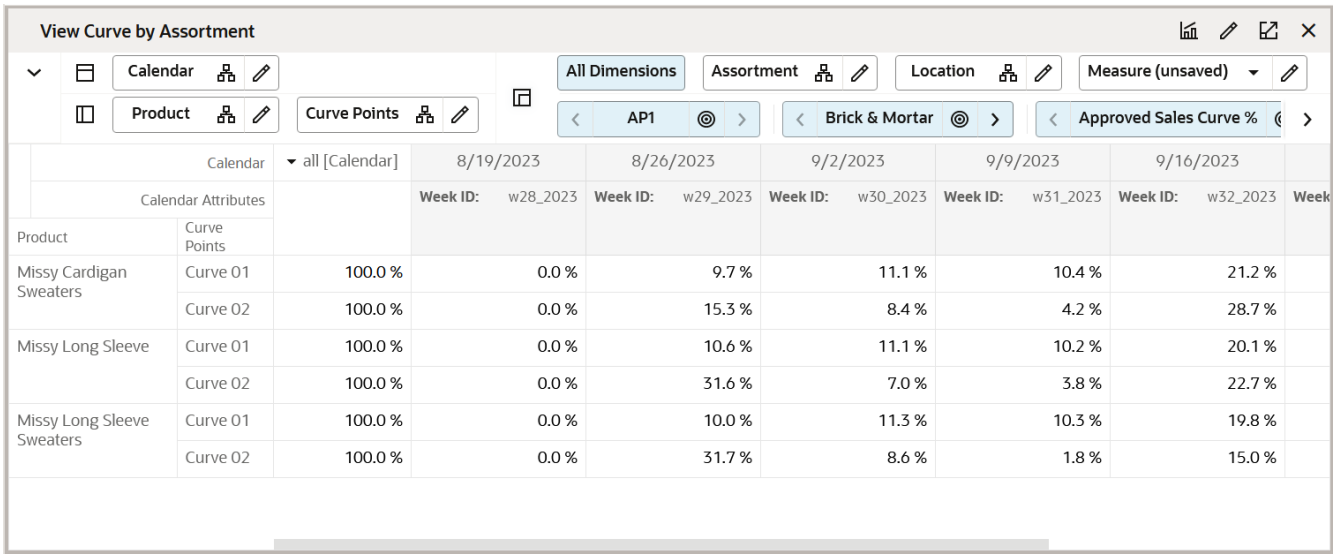
The step to complete this process:

- Review the curve library by each Assortment Period.

  Use the radio button to scroll through Assortment Period and Subclass, as necessary.

Note that you may use the filter button to filter by Assortment Periods that have been assigned a curve.

Figure 8-5 View Curve by Assortment View



Measure Table

Table 8-6 View Curve by Assortment View Measures

Label	Definition
Sales Curve %	The working plan sales curve used to hold the weekly sales percent to total of a particular curve.
Approved Sales Curve %	The approved sales curve used to hold the weekly sales percent to total of a particular curve.
Sales Curve Start Week	Indicates the start week of the sales curve.

9
Assortment Planning

Assortment Planning offers the depth and breadth of Assortments for retailers for a given season leveraging Artificial Intelligence and Machine Learning Algorithms to get forecast, assortment recommendations and optimized KPIs to meet the organizational goals. The first half of the Assortment Planning task is the preparation to go to market and making the key decisions on the number of options to carry. The high-level Assortment Planning process flow includes reviewing historical information, Forecast Targets and reconciling with MFP targets, setting plan parameters, Determine # of Options, defining the assortment, creating new options, Planning Buy Quantity for the Assorted Items the assortment goals, and finally, approving the assortment.

Typical Business Users

The typical business user who completes this task will be an Assortment Planner.

Data Requirements

- Last Year Sales/Forecast Sales data
- Current plan data from MFP
- Location hierarchy
- Product hierarchy
- Calendar hierarchy
- Sales Retail, Sales Unit, and Cost actuals
- Style/Color (Item/Option) attributes and attribute values
- Style/Color (Item/Option) images loaded by the Administrator (optional)

Create the Assortment Planning Segment

When working in a segment, it is a common practice to keep the wizard selections for the segment size limited to what will be worked on, to facilitate navigation and increase UI responsiveness.

To create the Assortment Strategy segment:

1. Click **Assortment Services** in the Task menu. Then, click the Planning Services activity and then the Assortment Planning task.
2. The dialog to create New Plan opens. Click **Create New Plan**.
3. Enter the Plan Label into the text field. Click **Ok**.
4. In Select Product, select one department and click **Next**.
5. In Select Assortment Period, select any one assortment period and click **Next**:
   - The Assortment Groups visible in the wizard are pre-ranged to the subcategories selected in the previous screen.

- To see the user-defined Assortment Period label, click the Dimension tile and select Assortment Label.
- The store clusters have also been assigned to each assortment period while creating assortment periods. You can directly jump into the workspace after making the product and season selections.

> **Note:**
>
> Assortment Labels can vary by Subclass. If multiple subcategories are selected, the label shown will be based on the first order Subclass.

Click **Finish**. The Create Assortment segment is built.

Assortment Planning Process Steps

The high-level steps to complete this process:

- Perform Last Year / Forecast Analysis of Sales, Gross Margin, Option Count, and Rate of Sales.
- Determine the Target number of Options.
- Create New Options.
- Run the Recommend Assortment Planning action to receive science-backed recommendations on the correct Assortments to select.
- Optimize key KPIs leveraging Assortment Optimization engine
- Review and manually update the Assortment mix if you want to add certain options to the Assortment mix for business reasons.
- Reconcile key KPIs against Forecast/MFP Targets
- Plan Buy Quantity
- Approve the plan.
- Additionally, if the Assortment Planning is used along with Assortment and Space Optimization Engine, then Assortment Plans are sent to ASO for space optimization, optimized plans are received and reviewed in AP.
- Approved ASO plans are available in Item Planning workflow for subsequent plan creation.

Steps, Tabs and Views in this Process:

Step 1: Assortment Strategy

- **Review History/Forecast/Target Tab**
  - Review Forecast View
  - Review LY History View
  - Review MFP Targets View
  - Define Forecast to Use View
- **Determine # (Number) of Options Tab**
  - Determine # of Options View

  - Status Override
  - Create Options View
  - Assign Attributes View
  - Define Retail Price/Cost View:
- **Plan Parameters Tab**
  - Define Thresholds View
  - Define Product Rollup View
  - LY Standard Deviation View
  - Review Attribute Weights View

Step 2: Plan Assortment

- **Recommend Assortment Tab**
  - Assortment Recommendation Parameters View
  - Review Assortment Recommended View
  - Review Assortment Recommended - Visual View
  - Review Assortment Depth View
  - Time Phased Visual Assortment View
  - Define Product Rollup View
- **Demand Transference Tab**
  - Demand Transference View
  - Review Substitutable Item Details View
- **Assortment Optimization Tab**
  - Set Optimization Parameters View
  - View Optimization Results View
  - Recommended/Optimized/Assorted Options View

Step 3: Plan Buy Quantity

- **Plan Buy Quantity Tab**
  - Plan Buy Quantity - Table View
- **Plan Buy Quantity By Size Tab**
  - Seed Size Profile View
  - Review Size Profile View
  - Review Buy Quantity by Size View

Step 4: Approve

- **Approve Tab**
  - Approve Plan View

Step 5: ASO-AP Integration

- **ASO Evaluation Tab**
  - Export/Request to ASO View

  - ASO Evaluation View
  - Approve Plan View

Step 1: Assortment Strategy

The first step in the Assortment Planning process is to arrive at Assortment Strategy. To create Assortment Strategy, you can start by reviewing the History/Forecast/MFP Targets and Determine the # of Options by using one of the sources as a baseline source. You can analyze the Last Year's Sales, Gross Margin, Option Count, Average Unit Retail, and Rate of Sales along with the plan targets. This information is intended to provide a complete picture of what needs to be accomplished by this assortment and what has been accomplished by prior assortments, both in terms of sales profitability and in terms of key trends and attributes that define each assortment. You can review the point of commerce plan/plan by each channel and reconcile it with MFP targets/Forecast Sales Targets. This action helps sets targets.

The next step in the Assortment Planning process is to determine the number of options. You can seed the Last Year, Forecast, or MFP targets, or set the values manually for Sales, Gross Margin, Rate of Sales, New Options, and Total Options enabling you to determine the targeted number of options for the assortment. The Assortment Strategy step also includes the setting of a couple of parameters required for planning.

Tabs and Views in this Step:

- **Review History/Forecast/Target Tab:**
  - Review Forecast View
  - Review LY History View
  - Review MFP Targets View
  - Define Forecast to Use View
- **Determine # (Number) of Options Tab:**
  - Determine # of Options View
  - Status Override
  - Create Options View
  - Assign Attributes View
  - Define Retail Price/Cost View
- **Plan Parameters Tab:**
  - Define Thresholds View
  - Define Product Rollup View
  - LY Standard Deviation View
  - Review Attribute Weights View

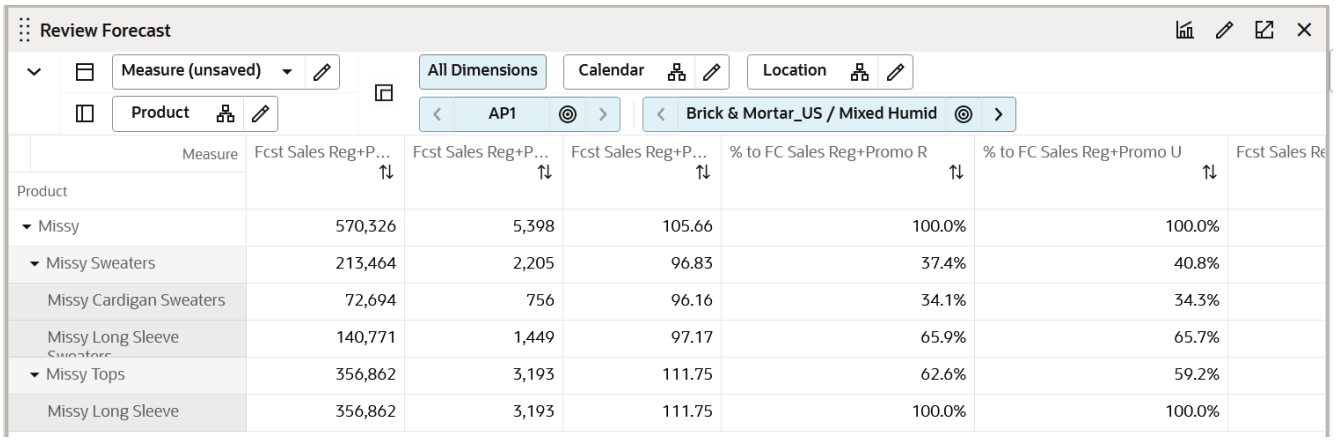
Review History/Forecast/Target Tab

In this tab, the Senior Buyer/Planner can review the forecast by subclass.

Review Forecast View

The Senior Buyer can view the Forecasted sales recommendation by AI Foundation Services and profitability for the time periods covered at the intersection of Subclass (or higher), Assortment Period, and Cluster (or higher) level. In the Administrative section, the Forecast from AI foundation services is loaded at Subclass, Week, and Cluster levels.

Figure 9-1 Review Forecast View



Measure Table

Table 9-1 Review Forecast View Measures

Label	Definition
Fcst Sales Reg+Promo C, AUC	Forecast Reg + Promo Cost, Average Unit Cost by Subclass, store, and week.
% to FC Sales R, U	The percentage of Forecast Sales Retails, Units of the specified Subclass to the sales of all the subcategories.
Fcst GM R, GM R %, ROS	Forecast Gross Margin Retail, Gross Margin Percentage and Forecast Rate of Sale
Fcst Sales Reg+Promo R, U, AUR	Forecast Sales + Promotional Retail, Units, and Average Unit Retail by Subclass, store, and week.

Measure Profile

Default Profile

This profile is used to access the view which focuses on the MFP Current Plan.

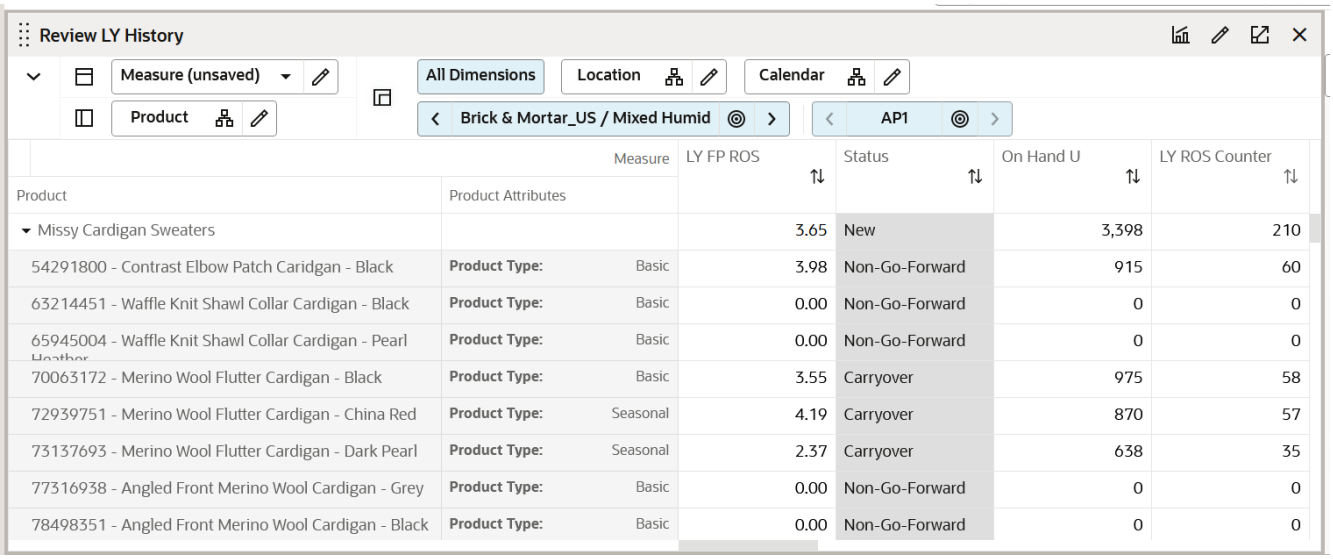
Review LY History View

This view focuses on the sales and profitability history of the prior year for the same time period by Style/Color (or higher) and Cluster (or higher). An additional profile, Gross Margin, is used to calculate total sales and Gross Margin based on the Total cost and Retail price. This Gross Margin can be one of the Targets while running the automation processes of Assortment Recommendation. The Assortment Strategy will continue to use only the full price sales data as you cannot intentionally plan assortments for clearance sales.

The step to complete this process:

- Analyze last year's values.

Figure 9-2 Review LY History View



Measure Table

Table 9-2 Review LY History View Measures

Label	Definition
LY GM R	Last Year Gross Margin Retail.
LY GM R %	Last Year Gross Margin percentage.
LY ROS	Last Year weekly Rate of Sales.
% to LY Sales Reg+Promo U, R	The Percentage of Sales Unit Retail of the option to all the options considered in the Last Year.
Rank by LY FP Sales U	Rank of the option by considering Last Year Sales Units.
LY FP Sell Thru %	The Last Year Sell Through percentage of the option.
Rank by LY FP Sell Thru %	Rank of the Option by considering Last Year Sell through percentage.
LY Reg+Promo R, U, AUR	Last Year Full Price Retail, Units, and Average Unit Retail.
Status	Auto-generated status of the option selected.
Status Override	The ability provided for the planner to override the auto-generated status per the business needs.
On Hand U	On Hand Inventory Units.
Location Count	Count of Locations assigned to each Store Cluster.
Assort Period Week Count	Number of Weeks in the Assortment Period.
LY BOP U	Last Year Beginning of Period Units.

Table 9-2 (Cont.) Review LY History View Measures

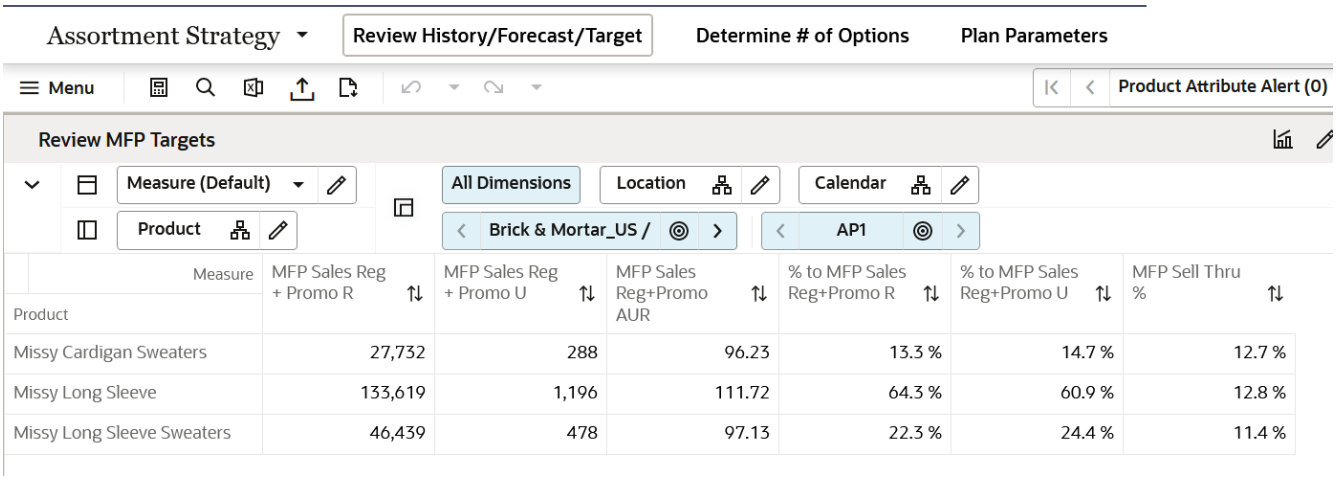
Label	Definition
LY Location Count	Count of Locations assigned to each Store Cluster Last Year.

Review MFP Targets View

The Senior Buyer can view the planned sales (from the Merchandise Financial and/or Location Plan) and profitability for the time periods covered at the intersection of Subclass (or higher), Assortment Period, and Cluster (or higher) level. In the Administrative section, the Merchandise Financial Plan and Location Plans (or LP) are spread down to the Subclass, Week, and Cluster levels (if they were not created originally at this level).

The default profile shows the Full price (Reg+Promo) Sales. An additional profile, Gross Margin, is used to calculate total sales and Gross Margin based on the Total cost and Retail price. This Gross Margin can be one of the Targets while running the automation processes of Assortment Recommendation. The Assortment Strategy will continue to use only the full price sales data as you cannot intentionally plan assortments for clearance sales.

Figure 9-3 Review MFP Targets View



Measure Table

Table 9-3 Review MFP Targets View Measures

Label	Definition
% to MFP Sales Reg+Promo R, U	The percentage of MFP Sales Retails, Units of the specified Subclass to the sales of all the subcategories.
MFP GM R	MFP Current Plan Gross Margin Retail.
MFP GM R %	MFP Current Plan Gross Margin Retail Percentage.
MFP Sales Reg+Promo R, U, C, AUC, AUR	MFP Current Plan Full Price Sales Retail, Units, Cost, Average Unit Cost, and Average Unit Retail by Subclass, store, and week.

Table 9-3 (Cont.) Review MFP Targets View Measures

Label	Definition
MFP Sell Thru %	Sell through percentage of the Subclass by the current plan of MFP.
Location Count	Count of Locations assigned to each Store Cluster.
Assort Period Week Count	Number of Weeks in the Assortment Period.
MFP Receipts U	MFP Current Plan Receipts Units.

Measure Profiles

Default Profile

This profile is used to access the view which focuses on the MFP Current Plan.

Gross Margin

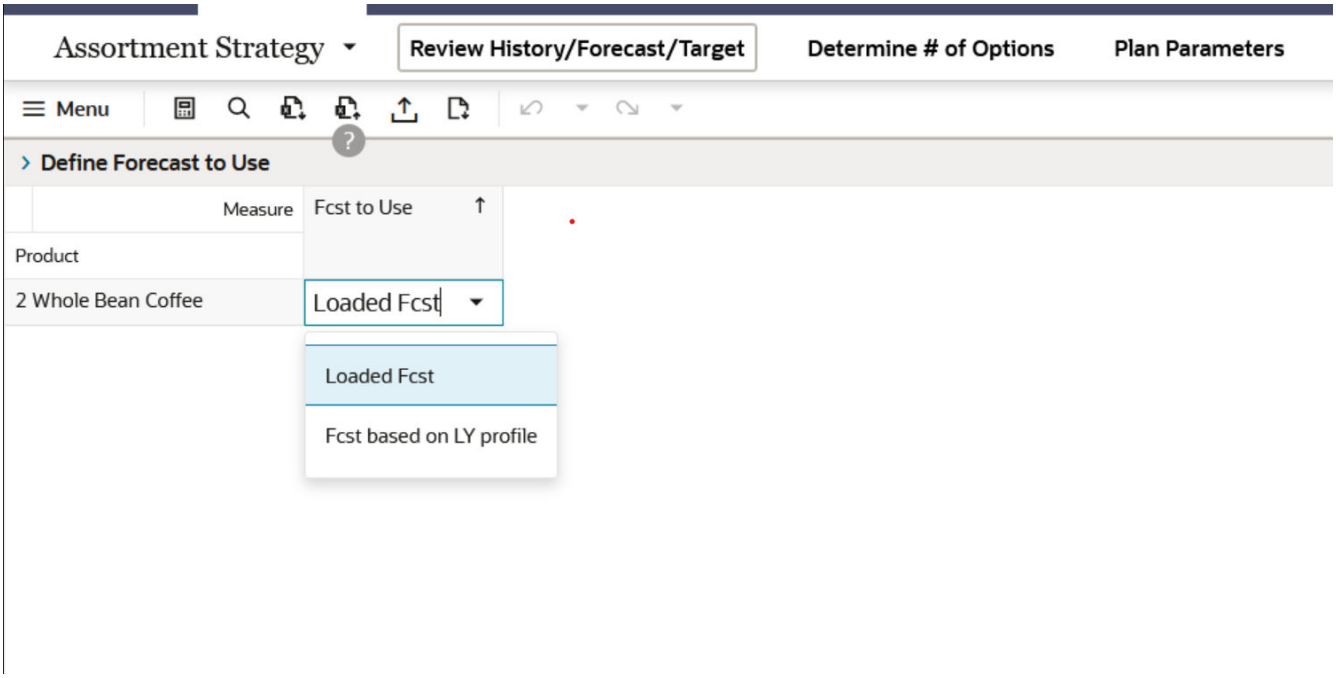
The Gross Margin profile is used to view the Gross Margin numbers of the MFP Current Plan.

Define Forecast to Use View

The Senior Buyer can select the source of forecast to be used as baseline in the Assortment planning process. Available sources are:

- Forecasted sales recommendation by AI Foundation Services. The forecast is available at item, week and cluster levels. This is the default forecast available for users to initiate planning
- Forecast based on Last Year Profile where Item level forecast derived from the sub-class level forecast. The Subclass level forecast is spread to item based on the item profile created based on historic sales.

Figure 9-4 Define Forecast to Use View



Determine # (Number) of Options Tab

In this tab, you can determine the # (number) of options. You can seed the last year, Forecast, or MFP targets, or set the values manually for Sales, Gross Margin, Rate of Sales, New Options, and Total Options enabling you to determine the targeted number of options for the assortment.

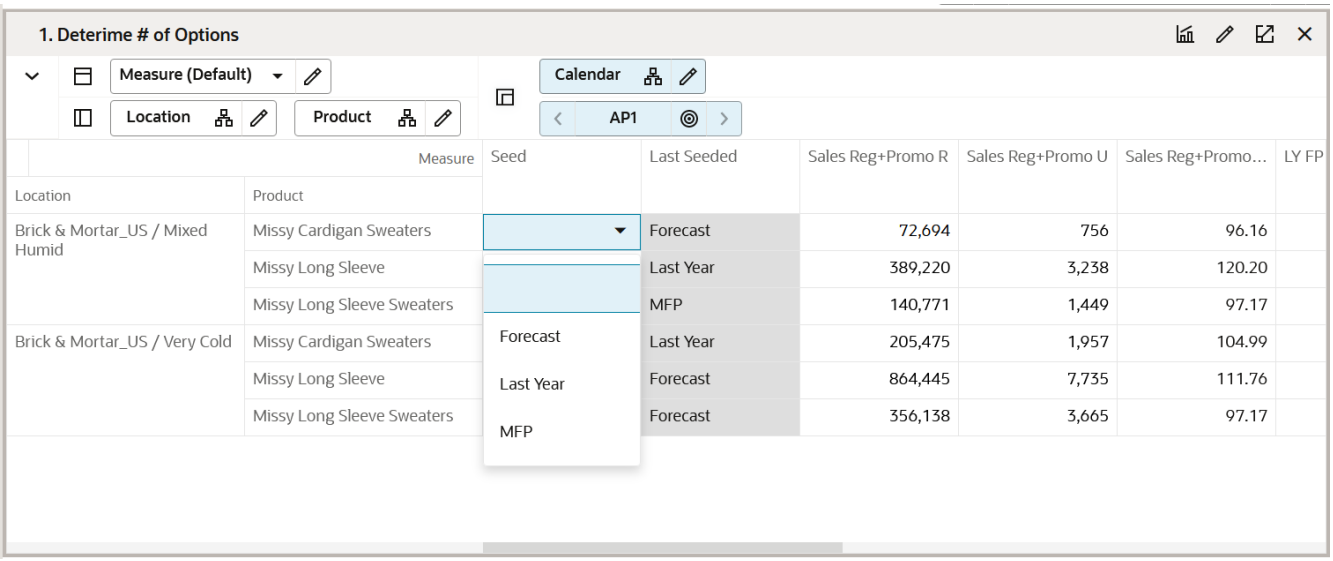
Determine # of Options View

The Determine # (number) of Options View is used to determine the target options, Sales, Gross Margin, Rate of Sales, total options, and new options for each subcategory (or higher level of the product hierarchy). You can seed the targets based on Last Year, Forecast, or MFP values. You can also override the seeded values of Sales, Gross Margin, Rate of Sales, and Total/new Options. The number of options is determined for the Full Price (Reg+Promo) only.

The steps to complete this process:

- Select Last Year, Forecast, or MFP from the Seed measure drop-down menu.
- Run the Seed Sales Application Action.

Figure 9-5 Determine # of Options View



Measure Table

Table 9-4 Determine # of Options View Measures

Label	Definition
Seed	Used to select seed from Last Year, Last Season, or MFP.
Last Seeded	Shows the seeding option selected previously for the plan.
AS Sales Reg+Promo R, U, C, AUR, AUC	Assortment Strategy (Working Plan) Full Price Sales Retail, Units, Cost, Average Unit Retail, and Average Unit Cost.
AS GM R	Gross Margin Retail.
AS GM R %	Gross Margin Retail percentage.
LY FP ROS	Last Year Full Price ROS.
AS FP ROS	Assortment Strategy (Working Plan) Full Price ROS.
AS FP Ttl Options	Assortment Strategy (Working Plan) Full Price Total Options.
AS Sales Reg+Promo R, U, C Var LY%	Sales Full Price Retail, Units, and Cost variance comparing to Last Year.
AS GM R Var LY%	Gross Margin Retail Variance comparing to Last Year.
AS GM R Var MFP CP%	Gross Margin Retail Variance comparing to MFP Current Plan.
LY Sales Reg+Promo R, U, C, AUR	Last Year's Full Price Sales Retail, Units, Cost, Average Unit Retail, and Average Unit Cost.
LY ROS Counter	Last Year Rate of Sale Counter was used in determining the total number of options, derived by reviewing the sales of items across stores having inventory for the weeks in each season. The Rate of Sale calculator also looks at the forecast. If a forecast is not available, it considers history.
LY GMR	Last Year Gross Margin Retail.
LY GMR%	Last Year Gross Margin percentage.

Table 9-4 (Cont.) Determine # of Options View Measures

Label	Definition
AS Sales Reg + Promo R, U, C Var MFP%	Assortment Strategy Full Price Sales Retail, Units, and Cost variance comparing to the Current Plan from MFP.
AS GM R Var MFP %	Gross Margin Retail Variance compared to the Current Plan from MFP.
MFP Sales R, U, C, AUR, AUC	Current Plan from MFP Total Sales Retail, Units, Cost, Average Unit Retail, and Average Unit Cost.
MFP GM R	Gross Margin Retail from the Current Plan of MFP.
MFP GM R%	Gross Margin percentage from the Current Plan of MFP.
MFP Sales Reg+Promo C, R, AUR, U	Full Price Sales Cost, Retail, Units, and Average Unit Retail from Current Plan of MFP.
AS New Options %	The New Options % drives how much of the assortment is carryover and how much is new for the planned assortment period.
AS New Options	Count of options that are new in the planned assortment period.
AS Carryover Options	Count of options that are calculated based on the Carryover status.

Measure Profiles

Default Profile

This profile is used to access the view which focuses on the Working Plan.

Last Year Profile

This profile is used to access the view that can be used when using Last Year as the basis for setting targets.

Forecast

The Forecast profile is used to access the view that can be used when using Forecast as the basis for setting targets.

MFP Profile

This profile is used to access the view that can be used when using plans imported from Merchandise Financial Planning as the basis for setting targets.

Application Action

Seed Sales

The Seed Sales Application Action is used to seed from Last Year, Last Assortment, or MFP sales data in the Determine # of Options view.

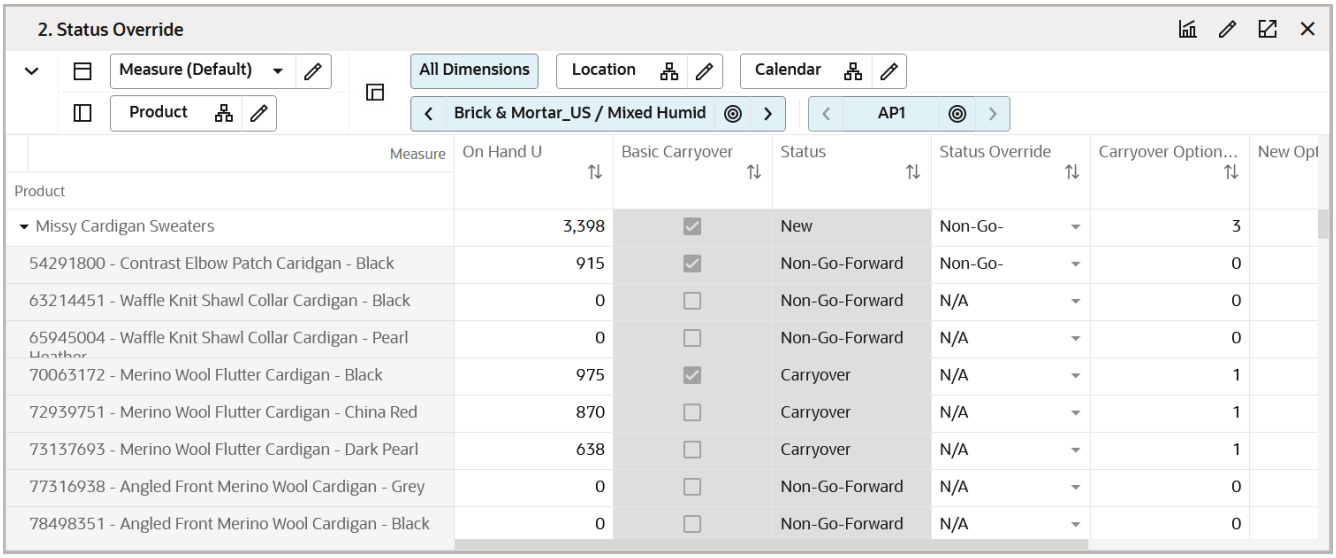
Status Override

This view is used to override the status of a style color if required while determining the number of options and the percentage of New versus Carry Over options. This will enable you

to make any quick status changes if required to arrive at the final # of options and the % of New versus Carryover items. The steps to complete this process:

- Review the status of style color.
- Override the status of style color to New or Carryover based on the business requirement. Click on calculate and review the New versus Carryover % in the assortment.

Figure 9-6 Status Override View



Product	On Hand U	Basic Carryover	Status	Status Override	Carryover Option...	New Opt
Missy Cardigan Sweaters	3,398	☑	New	Non-Go-	3	
54291800 - Contrast Elbow Patch Caridgan - Black	915	☑	Non-Go-Forward	Non-Go-	0	
63214451 - Waffle Knit Shawl Collar Cardigan - Black	0	☐	Non-Go-Forward	N/A	0	
65945004 - Waffle Knit Shawl Collar Cardigan - Pearl Heather	0	☐	Non-Go-Forward	N/A	0	
70063172 - Merino Wool Flutter Cardigan - Black	975	☑	Carryover	N/A	1	
72939751 - Merino Wool Flutter Cardigan - China Red	870	☐	Carryover	N/A	1	
73137693 - Merino Wool Flutter Cardigan - Dark Pearl	638	☐	Carryover	N/A	1	
77316938 - Angled Front Merino Wool Cardigan - Grey	0	☐	Non-Go-Forward	N/A	0	
78498351 - Angled Front Merino Wool Cardigan - Black	0	☐	Non-Go-Forward	N/A	0	

Measure Table

Table 9-5 Status Override View Measures

Label	Definition
On-Hand U	On Hand Units for a given style color.
Basic Carryover	Boolean measure to highlight an item as an item with the product type of Basic and having a carryover status because of on-hand and item end date.
Status	Final status of the item.
Status Override	Editable drop-down list to choose the item status from to override the current status.
WP FP Ttl Options	Total Number of Full Price options.
New Options	Total number of New options.
New Options %	Percentage of New options.
Carryover Options	Total number of carryover options.

Create Options View

Use the Create Options view to determine the items that new options must be created. Using Placeholder Maintenance, you can create/, modify, or delete the new options as needed.

This view is enabled with the AI infused Like Item Recommendation module that leverages Machine Learning capabilities to recommend the top five Like Items for the options in the view.

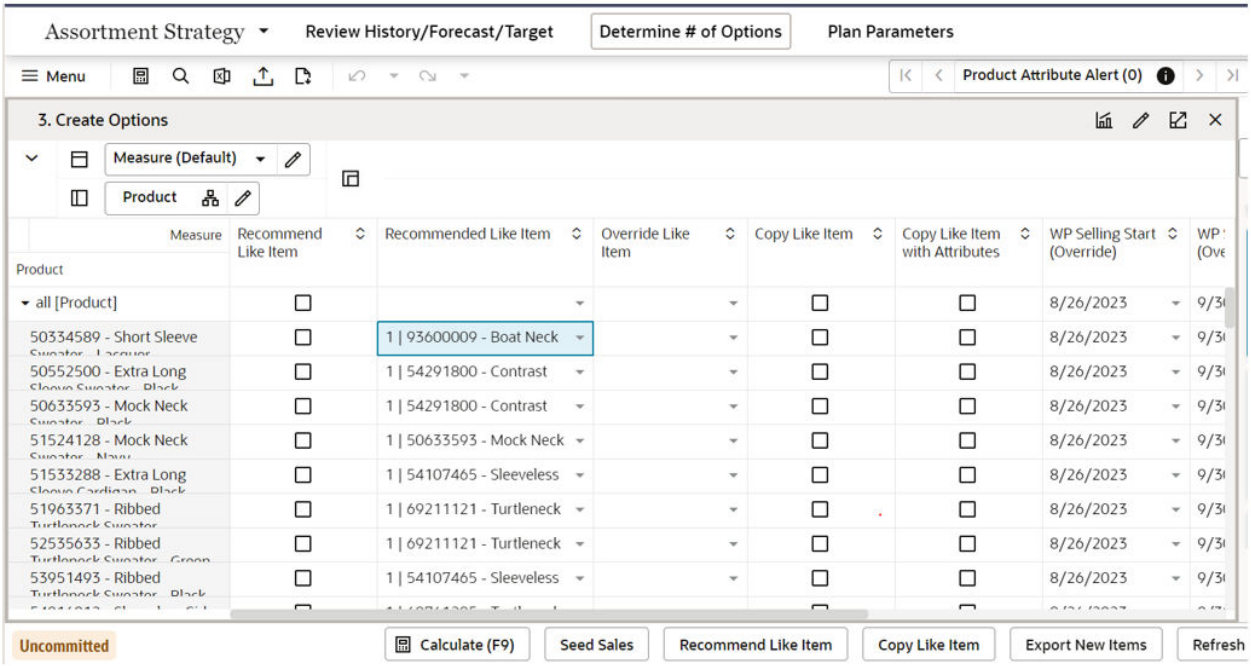
The application defaults the Like Item to the recommended Like Item ranked as Number 1. You can choose any of the top five recommendations. If you want to completely ignore this and manually key in a new like item, you can do so in the Override Like Item sections. To get Like Item recommendations, you need to select the Boolean **Recommend Like Item** and run the custom menu, **Recommend Like Item**.

Once you finalize the Like Item, you can select the Boolean **Copy Like Item** to copy the Like Item data, Like History, forecast, and Targets into the New Item/placeholder. If you want to synchronize the New Item attributes with the Like Item, Copy Like Item attributes should also be selected before running the custom menu **Copy Like Item**.

Perform these steps to complete the Create Option process:

- Decide the new options (items) to be created.
- Use Placeholder Maintenance to create, modify, or delete the new options (items) and specify or update item attributes.
- Use Like Item Recommendation option to obtain Like Item Recommendations based on Item Similarity.
- If you like the recommended Like Item, select the **Copy Like Item** Boolean and run the custom menu, **Copy Like Item** to copy the Like Item history and forecast to the new placeholder.
- If you want to override the system recommended Like Item, specify the New Like Item in the Override Like Item, select the **Copy Like Item** Boolean and run the custom menu **Copy Like item** to copy the Like Item history and forecast to the new placeholder.
- You can also update the attributes to exactly match the Like Item attributes.
- Determine the start and end week of all the options (New and Carryover) to specify the selling weeks or flow within a given season.
- Select the item as **Mandatory** if the option is to be considered a must-have option in the Final Assortment.
- Modify Retail Price, Cost, and/or Initial Markup % (IMU %).
- Assign the size range values from the list (this should have been loaded by the Administrator).

Figure 9-7 Create Options View



Measure Table

Table 9-6 Create Options View Measures

Label	Definition
Recommend Like Item	Boolean measure used to qualify an item for Like Item Recommendation.
Recommended Like Item	String measure containing the Recommended Like Item. Also a drop-down measure containing the top five Like Items that can be used while creating plans for placeholders. The value always defaults to the topmost similar item. You can manually select any of the five Recommended Like Items.
Override Like Item	String measure to override the Like Item if you want to manually key in a Like Item.
Copy Like Item	Boolean measure that has the Custom Menu copy Like Item data Like History, Forecast, and so on into the New Item/placeholder.
Copy Like Item Attributes	Boolean measure used to copy the attributes of a Like Item into placeholders if you want to have the exact same attributes for placeholders.
Wp Selling Start Week(Override)	Wp Selling Start week is the beginning of the selling cycle for the option. If this is not overridden, the first week of the season is considered the item selling start week.
Wp Selling End Week(Override)	Wp Selling End week is the last week of selling cycle for the option. If this is not overridden, the last week of the season is considered the item selling end week.

Table 9-6 (Cont.) Create Options View Measures

Label	Definition
Mandatory	An option is selected as a mandatory option if the option is necessary in the final assortment.
Export Placeholder to RMS	Select the Boolean checkbox to export the newly created placeholder to Oracle Retail Merchandise Foundation Cloud Service (RMFCS).

Measure Profiles

Default Profile

The Default profile is used to create new placeholder positions, assign any Like Item as needed, and adjust the Base unit retail price and cost. You can also associate the size ranges to the options and can also choose if the placeholder position created should be exported to the Merchandising system or not.

Enhanced DPM / Placeholder Maintenance

The Create Options view is DPM-enabled and can be used to create new positions with utmost ease. The Import DPMs from the Excel feature can create bulk placeholders with minimum effort. For more information on DPM or Placeholder Maintenance, see the *Oracle Retail Predictive Application Server Cloud Edition User Guide*.

Assign Attributes View

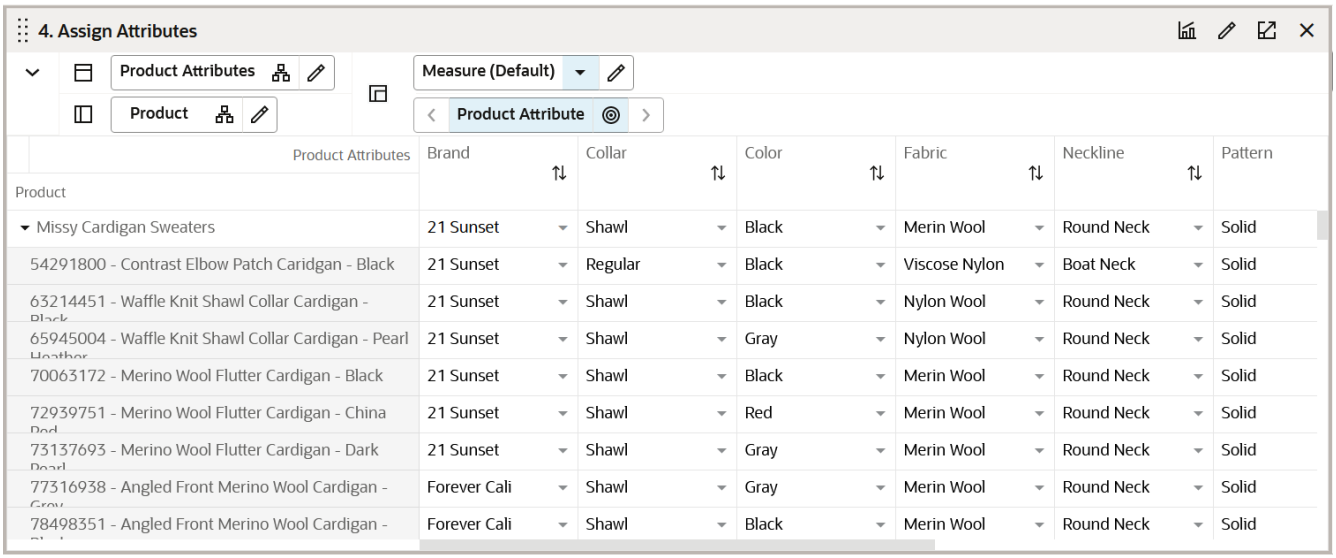
The Assign Attributes view is used to assign attributes to the new placeholder items. You can select/override the attribute values for the placeholder items created and for already existing items. An additional attribute called product type allows you to categorize style-colors as Basics or seasonal lines. Basics are all the merchandise that runs through the year irrespective of the season, such as White T-shirts, socks, Denims, Hand keys, and so on. Most retailers have a consistent and predictable demand for these basic lines. Seasonal style colors are all those items that last a particular season, such as sweaters for winter, cotton clothes for summer, and so on. The product type attribute allows you to plan basics across multiple seasons in one go in Item Planning - Basic which allows you to focus more on seasonal items that are short life cycle products.

Whileyou are allowed to make changes to an existing item's attributes in this view, those changes will not be sent back to a Master Data Management (MDM) system such as Oracle Retail Merchandise Foundation Cloud Service (RMFCS), which is the system of record for product attribute information. If a change is made to an existing item here, it will need to be communicated back to the source system. This view validates and highlights any attributes that are unassigned and brings them to your attention.

The step to complete this process:

- For placeholder items, assign the appropriate attribute values.
- Set the attribute values for the newly created placeholder items that are unassigned with values for the required attributes.

Figure 9-8 Assign Attributes View



Measure Table

Table 9-7 Assign Attributes View Measure

Label	Definition
Edit Attribute Value	Drop-down list measure that enables the mapping/overriding of item attribute values to an item.
Export Placeholder to RMS	Select the Boolean checkbox to export the placeholder information to Oracle Retail Merchandise Foundation Cloud Service (RMFCS).

Measure Profile

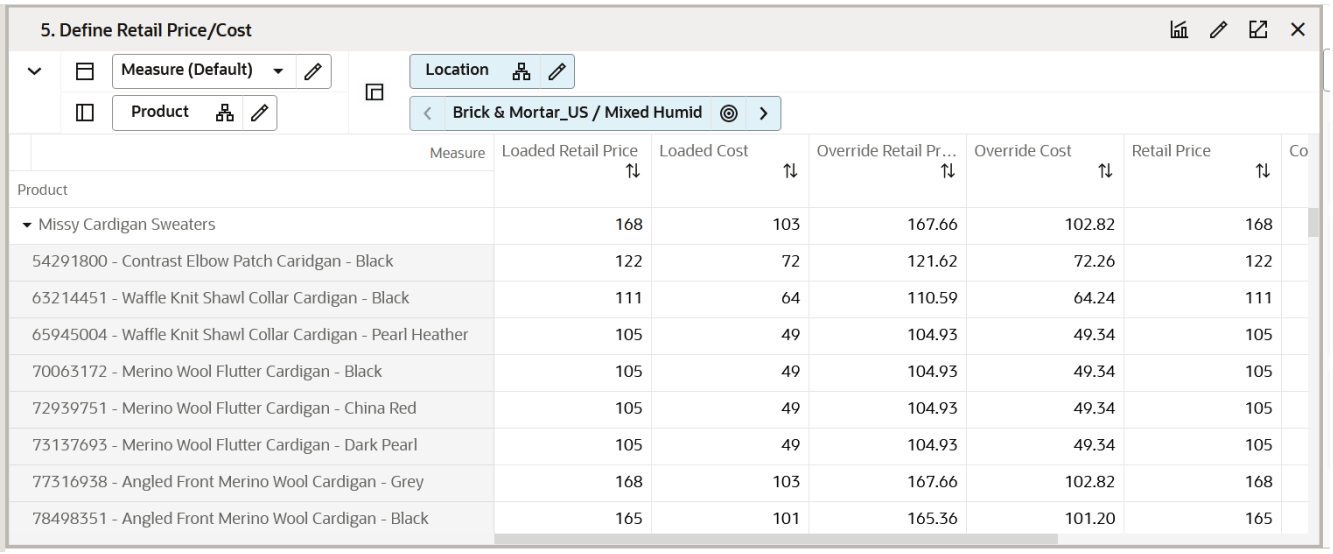
Default Profile

The Default profile is used to assign/override the product attribute values for the items.

Define Retail Price/Cost View

This view contains the loaded Retail Price and Cost Price for each Style-Color. You can also override the loaded Retail or Cost Price. This information is later used in the planning process in Item Planning.

Figure 9-9 Define Retail Price/Cost View



Product \ Measure	Loaded Retail Price	Loaded Cost	Override Retail Pr...	Override Cost	Retail Price	Co
Missy Cardigan Sweaters	168	103	167.66	102.82	168	
54291800 - Contrast Elbow Patch Caridgan - Black	122	72	121.62	72.26	122	
63214451 - Waffle Knit Shawl Collar Cardigan - Black	111	64	110.59	64.24	111	
65945004 - Waffle Knit Shawl Collar Cardigan - Pearl Heather	105	49	104.93	49.34	105	
70063172 - Merino Wool Flutter Cardigan - Black	105	49	104.93	49.34	105	
72939751 - Merino Wool Flutter Cardigan - China Red	105	49	104.93	49.34	105	
73137693 - Merino Wool Flutter Cardigan - Dark Pearl	105	49	104.93	49.34	105	
77316938 - Angled Front Merino Wool Cardigan - Grey	168	103	167.66	102.82	168	
78498351 - Angled Front Merino Wool Cardigan - Black	165	101	165.36	101.20	165	

Measure Table

Table 9-8 Define Retail Price/Cost View Measures

Label	Definition
Retail Price	An item's base retail value.
Cost	An item's base cost value.
Loaded Retail Price	Retail Price of the item loaded from an external system
Loaded Cost	Cost of the item loaded from an external system
Retail Price (Override)	Retail Price of the item Overridden by the planner
Cost(Override)	Cost of the item Overridden by the plan

Plan Parameters Tab

In this tab, the Senior Buyer/Planner can include the minimum threshold sales unit, receipts unit and/or carryover min stock to consider the style/color as a carryover item.

Depending on the threshold units defined for carryover min stock, the item status changes according to Carryover or Non-Go Forward status of Seasonal items. Items can be categorized as Basic/Seasonal items by specifying the corresponding attribute of product type. For all Basic items, Carryover status is derived from the combination of item lifecycle end date and on-hand units at the beginning of the assortment period.

The sales and receipt unit thresholds defined will be used in the ROS calculation. Only if the number of units is beyond the minimum threshold defined for Sales U and Receipts U, ROS will be calculated.

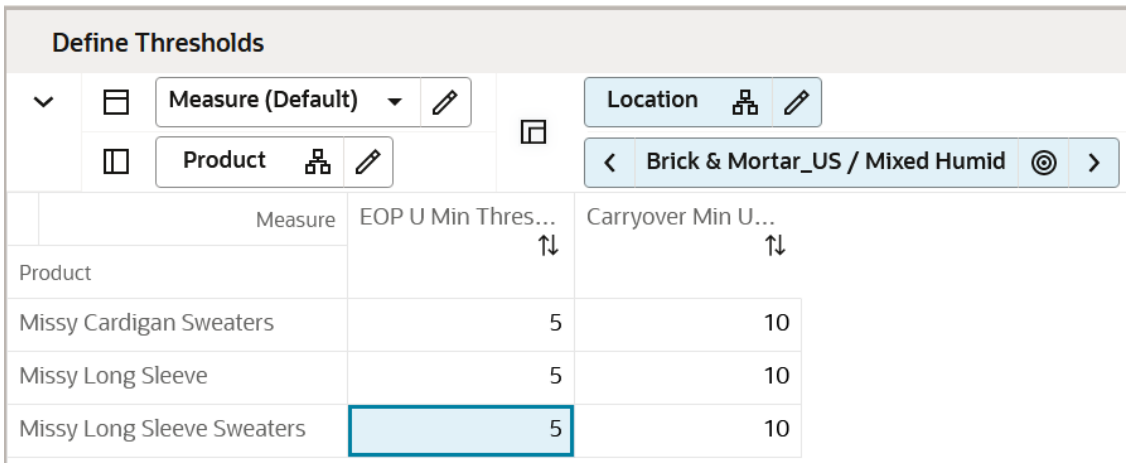
Define Thresholds View

This view focuses on removing special, one-off buys to optimize the history used for target option calculations. You can create the parameters around historical data used to calculate the Target Number of options.

The step to complete this process:

- Define thresholds for minimum Sales Units, Receipts Units, and Carryover Units.

Figure 9-10 Define Thresholds View



Measure Table

Table 9-9 Define Thresholds View Measures

Label	Definition
EOP U Min Threshold	Minimum EOP Units threshold to consider the options into the Rate of Sales Calculation that is defined at subclass or higher levels.
Carryover Min Units Threshold	Minimum on hand Units threshold to consider the options as Carryover status.

Measure Profile

Default Profile

This profile is used to access the view which focuses on defining the thresholds.

Define Product Rollup View

The Define Product Rollup view is used to select product attributes to view in an alternate hierarchy. This is available in the tab to display the item level. Nested product attribute rollup is provided with three levels. You can set up to three different combinations for nested rollup with a maximum of three levels in each combination. Nesting of dynamic attributes is a configurable option.

For example: As a first combination, you select Brand as Level 1, Color as Level 2, and Fabric as Level 3 by clicking the list of attributes available in that category.

This allows you to rollup your items by brand, then color inside each brand and then by fabric inside each color. This feature also allows you to view subtotals for each of the levels. You can edit subtotals and spread the values to all the associated child positions.

You can analyze, review, and edit the proposed assortment based on important attributes. You may select up to three attributes at a time for the dynamic rollup.

The steps to complete this process:

- Select up to three dynamic product attributes from the drop-down list.
- Run the Refresh Product Rollup Application Action.
- To view the product attribute:
  - In a view that displays the item level, click the Product Hierarchy tile.
  - Select the attribute (Attribute 1 or 2 or 3) that you would like to view in the nested dynamic rollup.
  - Click **OK**.

Figure 9-11 Define Product Rollup View

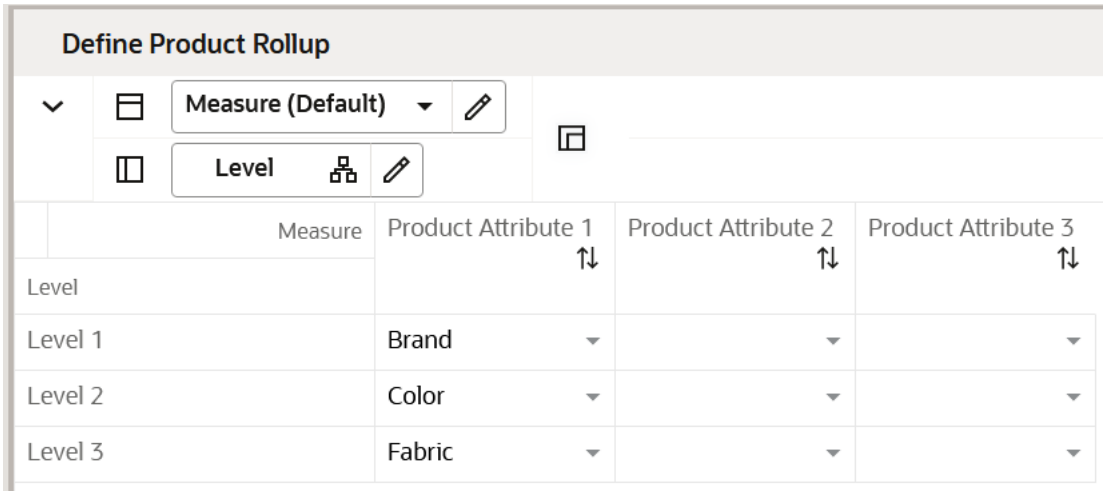
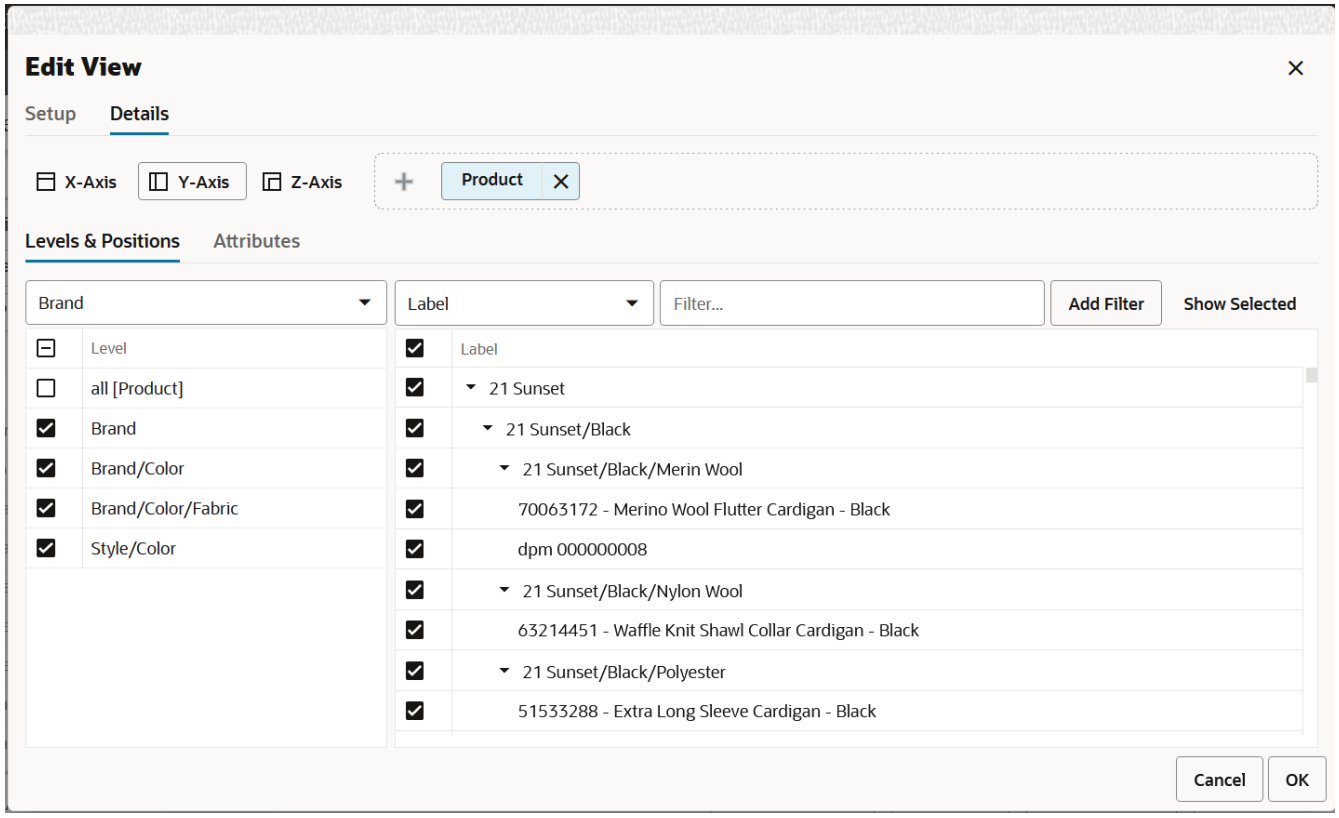
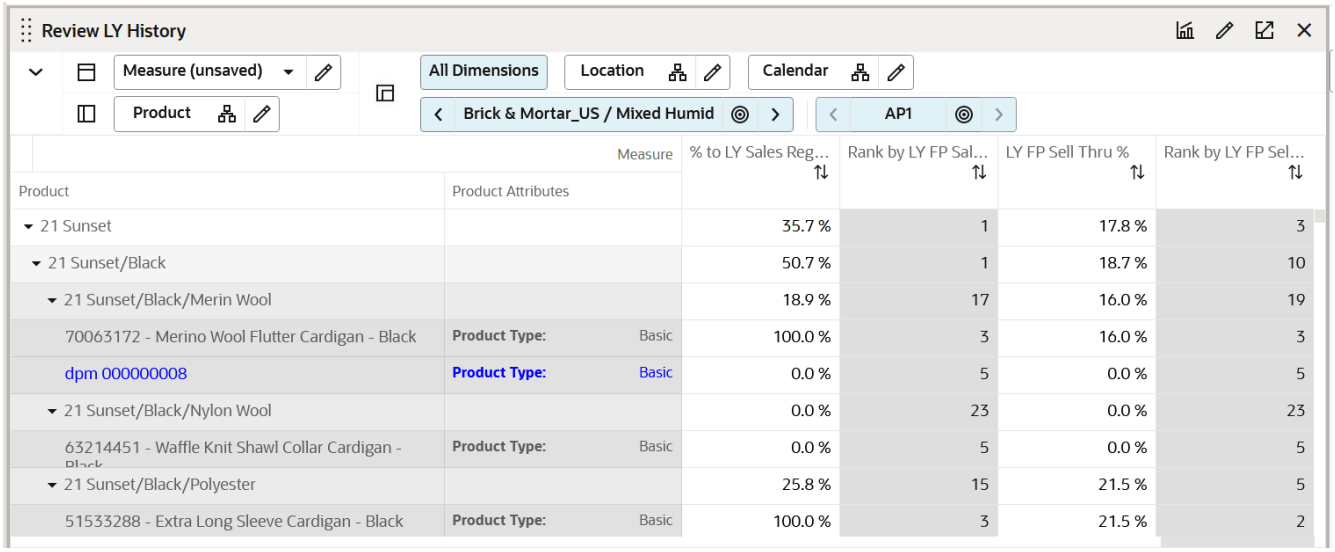


Figure 9-12 Edit View



When selecting the alternate dynamic hierarchy defined in the product rollup window in the views, you can see the subtotals at each nested level. For all the editable measures, you can edit these subtotals to spread the values to all the associated positions.

Figure 9-13 Subtotals



Measure Table

Table 9-10 Define Product Rollup View Measure

Label	Definition
Product Attribute 1, 2, 3	Drop-down list to present product attributes for nested dynamic product hierarchy rollup.

Measure Profile

Default Profile

The Default profile is used to select dynamic product attributes. You can view up to three levels to review and work on plans rolled up to multiple attributes. Using the nested dynamic product rollup feature, you can group plans for three different attributes. If your are working on a class and if Level 1 is brand, Level 2 is color, and Level 3 is fabric, you can review and analyze plans for all brands of a class, then across all colors inside each brand, and then across every fabric for each color. For all the editable measures, you can even edit these subtotals visible across each level to spread the plans to lower positions.

Application Action

Refresh Product Rollup

The Refresh Product Rollup Application Action creates dynamically updated alternate hierarchies based on user-defined attribute selections. After running the application action, you may select the alternate product hierarchy to see plans grouped based on the attribute selections.

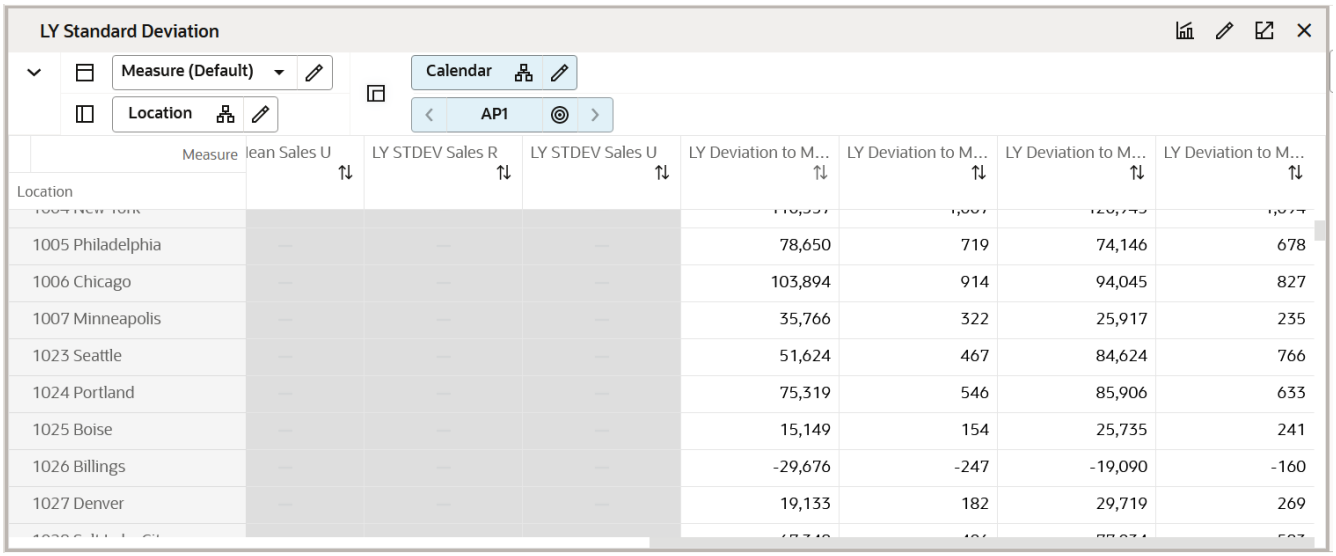
LY Standard Deviation View

This view focuses on providing the history of the sales deviation of each store in variance to the average. Deviations act as a decision point to decide what a store assortment should look like. Deviations are simply the variance to a mean. This will help you to plan a tighter assortment for stores selling less than the average and a larger assortment for stores selling better than the average.

The step to complete this process:

- Analyze the last year deviation of the stores.

Figure 9-14 LY Standard Deviation View



Measure Table

Table 9-11 LY Standard Deviation View Measure

Label	Definition
LY Sales Reg + Promo R	Last Year Full Price Sales Retail value sold in each store.
LY Sales Reg + Promo U	Last Year Full Price Sales Units sold in each store.
LY Mean Sales R	Last Year Average of Sales Retail across all selected stores visible at cluster and higher cluster level only.
LY Mean Sales U	Last Year Average of Sales Units across all selected stores visible at cluster and higher cluster level only.
LY STDDEV Sales R	Last Year Standard Deviation of Sales Retail calculated at cluster and higher levels.
LY STDDEV Sales U	Last Year Standard Deviation of Sales Units calculated at cluster and higher levels.
LY Deviation to Mean Sales @ Cluster R	Last Year Deviation of Sales Retail of Store from the mean at Cluster level and higher.
LY Deviation to Mean Sales @Cluster U	Last Year Deviation of Sales Units of Store from the mean at Cluster level and higher.
LY Deviation to Mean Sales @ Channel R	Last Year Deviation of Sales Retail of Store from the mean at Channel level and higher.
LY Deviation to Mean Sales @ Channel U	Last Year Deviation of Sales Units of Store from the mean at Channel level and higher.

Measure Profile

Default Profile

The Default profile is used to select dynamic product attributes. You can view up to three Levels to review and work on Plans rolled up to multiple attributes. Using the nested dynamic product rollup feature, you can group plans for three different attributes. If you are working on a

class and if level 1 is brand, level 2 is color, and level 3 is fabric, you can review and analyze plans for all brands of a class, then across all colors inside each brand and then across every fabric for each color. For all the editable measures, you can even edit these subtotals visible across each level to spread the plans to lower positions.

Application Action

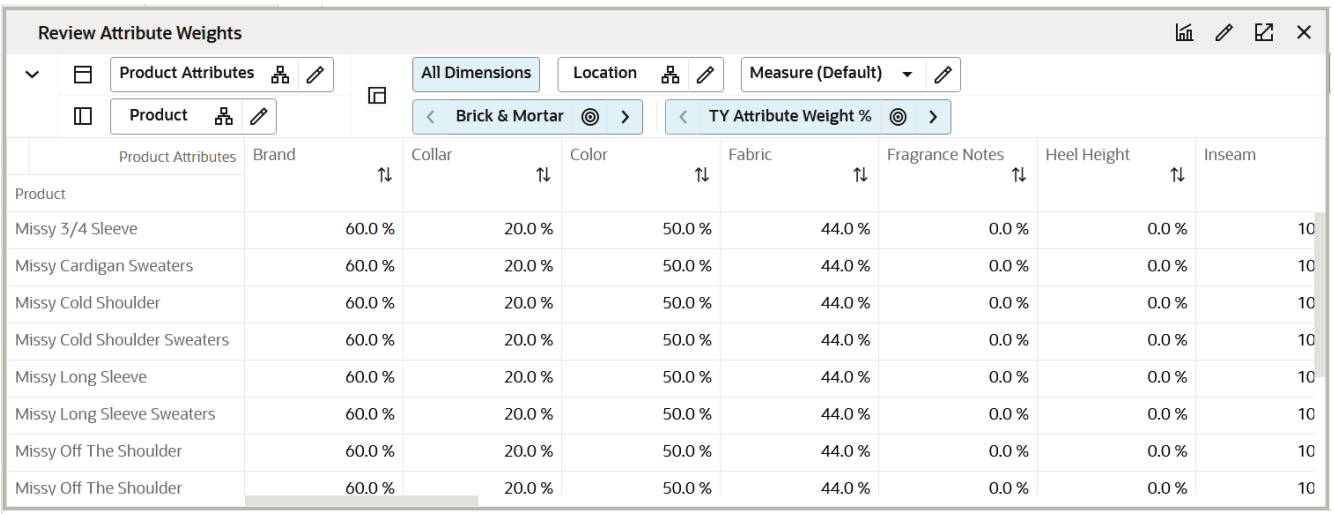
Refresh Product Rollup

The Refresh Product Rollup Application Action creates dynamically updated alternate hierarchies based on user-defined attribute selections. After running the application action, you may select the alternate product hierarchy to see plans grouped based on the attribute selections.

Review Attribute Weights View

This view shows the weights of different product attributes determined by AI Foundation services. Also, attributes are ranked based on their individual weights. This information is provided to guide you on what attributes to emphasize while arriving at the assortment plans.

Figure 9-15 Review Attribute Weights View



Product Attributes / Product	Brand	Collar	Color	Fabric	Fragrance Notes	Heel Height	Inseam
Missy 3/4 Sleeve	60.0 %	20.0 %	50.0 %	44.0 %	0.0 %	0.0 %	10
Missy Cardigan Sweaters	60.0 %	20.0 %	50.0 %	44.0 %	0.0 %	0.0 %	10
Missy Cold Shoulder	60.0 %	20.0 %	50.0 %	44.0 %	0.0 %	0.0 %	10
Missy Cold Shoulder Sweaters	60.0 %	20.0 %	50.0 %	44.0 %	0.0 %	0.0 %	10
Missy Long Sleeve	60.0 %	20.0 %	50.0 %	44.0 %	0.0 %	0.0 %	10
Missy Long Sleeve Sweaters	60.0 %	20.0 %	50.0 %	44.0 %	0.0 %	0.0 %	10
Missy Off The Shoulder	60.0 %	20.0 %	50.0 %	44.0 %	0.0 %	0.0 %	10
Missy Off The Shoulder	60.0 %	20.0 %	50.0 %	44.0 %	0.0 %	0.0 %	10

Measure Table

Table 9-12 Review Attribute Weights View Measures

Label	Definition
Attribute Weight %	This measure shows the % weight of the attribute. The higher the attribute weight, the better are the assortments.
Attribute Weight Rank	Rank of each item attribute based on the attribute weight.

Step 2: Plan Assortment

The Plan Assortment step allows you to create Assortment Powered by science-generated Assortment recommendations. The Demand Transference module is an optional module that

allows you to see unique demand and transferable demand of an item, there by guiding you to make right assortment decisions. The Assortment Optimization Engine further optimizes the specific KPIs to meet the financial goals. The Assortment Optimization Engine also helps you to Add, Drop or Swap options based on various parameters helping the retain the best profitable Assortments for the chosen selling cycle.

If the Demand Transference module is enabled, that can be executed to get a preview of substitutable items, transferable demand, unique demand of an item and make informed decisions.

Tabs and Views in this Step:

- **Recommend Assortment Tab**
  - Assortment Recommendation Parameters View
  - Review Assortment Recommended View
  - Review Assortment Recommended - Visual View
  - Review Assortment Depth View
  - Time Phased Visual Assortment View
  - Define Product Rollup View
- **Demand Transference Tab**
  - Demand Transference View
  - Review Substitutable Item Details View
- **Assortment Optimization Tab**
  - Set Optimization Parameters View
  - View Optimization Results View
  - Recommended/Optimized/Assorted Options View

Application Actions

Recommend Assortment

Use the Recommend Assortment planning action to get the first initial recommendation of assortments leveraging the AI Foundation module to achieve a particular goal. You can try to meet one of the targets from the drop-down list. If the Target option is selected, built-in intelligence tries to recommend assortments to meet the targets defined in the number of steps. If the MFP Target or Forecast is picked, science recommends assortments to meet the MFP Target and Forecast Target respectively. If you pick the Strategy plan as the recommend option, then you also need to define which KPI should be met to get the best results for your goals for your particular products.

Run DT

Use the Run DT Application Action to optimize the Sales U and R using Demand Transference logic to avoid the overstocking or under-stocking of each option. This is run for subclass, cluster, and assortment period.

Accept DT

Use the Accept DT Application Action to accept the DT recommended optimized Sales U and Sales R.

Run Optimization

The Run Optimization Application Action is used to optimize the assortment by either adding, removing, or swapping options from the assortment to meet the assortment goals of maximizing one of the Sales U, Sales R, Gross Margin, or Meeting MFP Targets.

Accept Optimization

The Accept Optimization Application Action is used to accept and commit the optimized results recommended by the Assortment Optimization engine if you are happy with the recommendations.

Refresh Product Rollup

The Refresh Product Rollup Application Action creates dynamically updated alternate hierarchies based on user-defined attribute selections. After running the application action, you may select the alternate product hierarchy to see rollups based on the attribute selections.

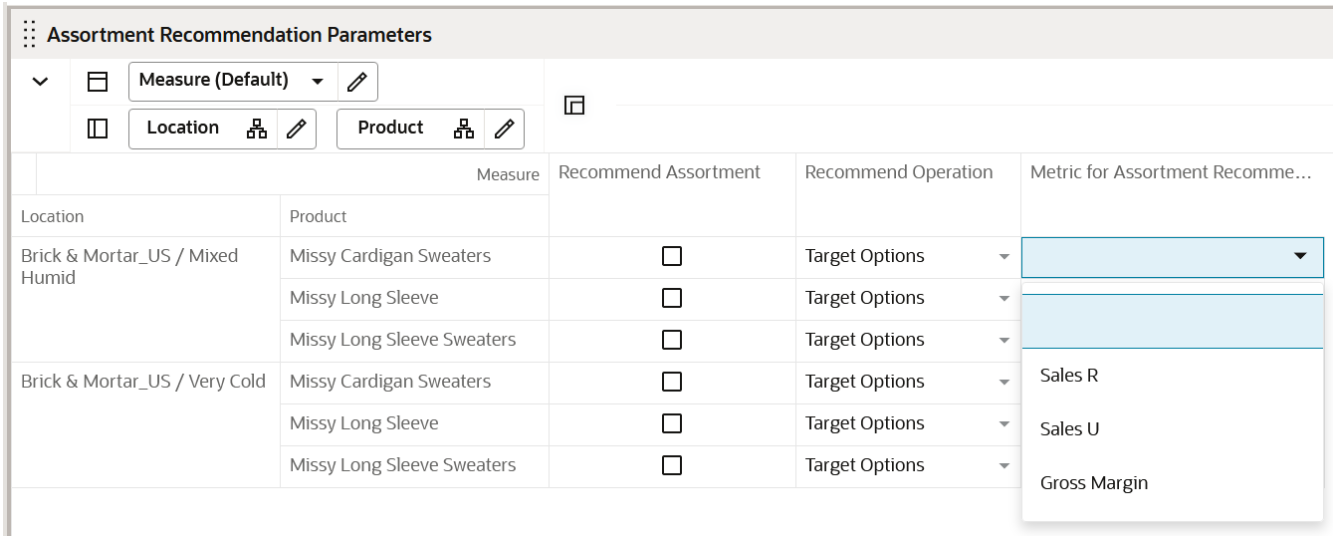
Recommend Assortment Tab

Assortment Recommendation Parameters View

This view allows you to set the parameters to recommend Assortments. The lowest level recommendations set are at the cluster/subclass level. You can choose various targets to meet from the available drop-down list. The values available are target options, MFP Targets, Forecasts, or Strategy Plans. If you choose the target options, the Assortment options are recommended to meet the target options set in the Determine # of options step. If MFP Targets are selected, Assortments are recommended to meet the MFP Targets. Similarly if Forecast is selected as the parameter, Assortment options are recommended to meet the Subclass level Forecast Targets. If you choose Strategy plan as the option, you can specify the KPI that needs to be matched to meet a specific business objective. You can choose the recommended option as Strategy plan and Metric for Assortment Recommendation as Sales U, in this case, the built-in AI Foundation recommends assortments to meet Sales U planned previously.

The system is intelligently built to consider the status of mandatory options, carryover options, Rate of Sale, item similarity score, attribute weights of the item and so on, to arrive at the best possible Assortment recommendation.

Figure 9-16 Assortment Recommendation Parameters View



Measure Table

Table 9-13 Assortment Recommendation Parameters View Measures

Label	Definition
Recommend Assortment	Measure to select the subclasses/cluster combination to be considered for the assortment recommendation
Recommend Operation	Drop-down list measure to choose from Target options, MFP Target, Forecast and Strategy Plan
Metric for Assortment Recommendation	If the Recommend operation is selected as Strategy plan, you should specify one of the metrics to meet to get the best possible assortment recommendations

Measure Profile

Default Profile

The Default profile is used to select Assortment Recommendation Parameters.

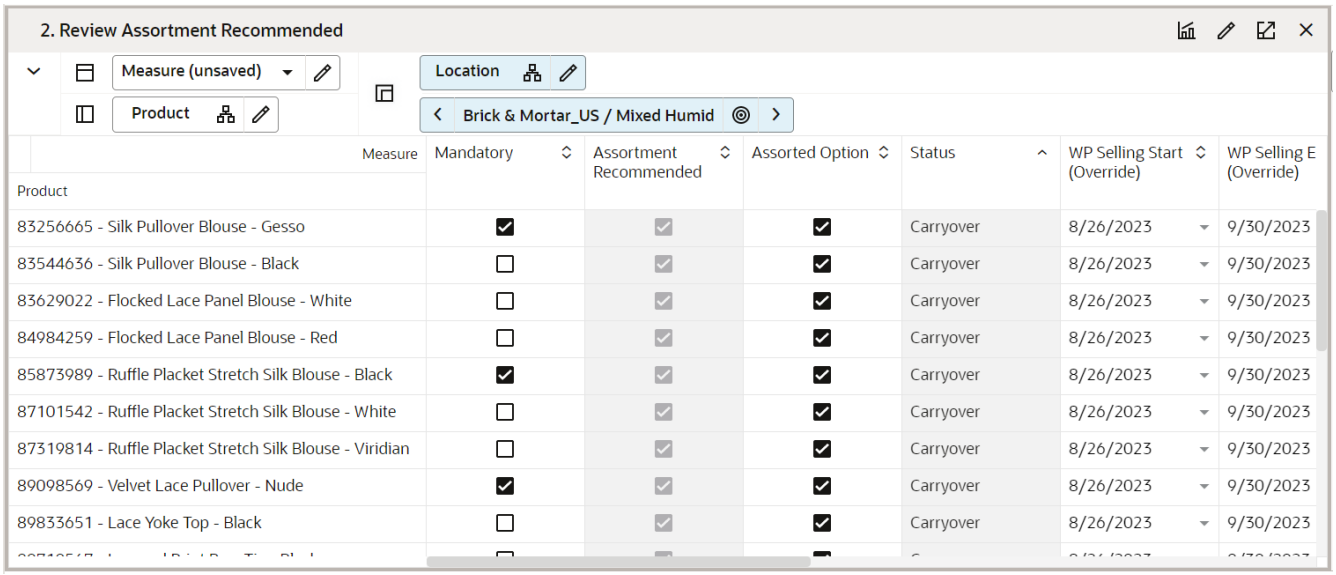
Recommend Assortment

Recommend Assortment application action recommends the best-performing assortments based on the parameters set by the planner. The Application Action considers the status of mandatory options, carryover options, Rate of Sale, item similarity score, attribute weights of the item and so on, to arrive at the best possible Assortment recommendation.

Review Assortment Recommended View

The Review Assortment Recommended view enables you to review the assortment recommendations provided by the built-in AI Foundation engine. This view also allows you to override the AI Foundation recommendations and make manual changes if required. This view provides a comprehensive set of all key metrics required to make assortment decisions. This view contains key information such as Recommended Rate of Sale, Target number of options and the assorted total number of options, New versus Carryover % of Items, the beginning and end of Selling weeks, total selling weeks, and so on. You can review all the information and make edits any if required to address a business use case. Once assortments are created here, you can review the assortment depth and the time-phased assortment plan in the subsequent views to ensure assortments are planned well and spread well across various weeks in a season.

Figure 9-17 Review Assortment Recommended View



Measure Table

Table 9-14 Review Assortment Recommended View Measure

Label	Definition
Assorted Option	Editable Boolean measure signifying if a particular option is assorted or not.
Mandatory	Boolean measure to select a style-color as a mandatory option
Assortment Recommended	Read-Only Boolean measure marked as true if recommended by built-in AI Foundation engine
Total Option count	Total Option Count Assorted
AS FP Total Option Count	Assortment Strategy Target Total option count arrived at in the Determine # of Steps view
Status	Status of the item signifying if it is a New, Carryover, or a non-go forward item.
WP Selling Start Week(Override)	Beginning of the selling cycle of the option
Wp Selling End Week(Override)	End of the selling cycle of the option
FP ROS Recommended	Forecasted Full Price weekly Rate of Sales Recommended.
FP ROS	Forecasted Full Price weekly Rate of sales.
Sales Reg+Promo U Recommended	Recommended Full Price Sales Units
AS Sales Reg+Promo U	Full Price Sales units.
AS Sales Reg+Promo R	Full Price Sales Retail.
Selling Weeks	Total number of weeks an option is planned to be sold
AS Carryover Option Count	Total number of carryover options
AS New Options Count	Total Number of new options

Review Assortment Recommended - Visual View

Review Assortment Recommended - Visual view is used to review the items for the Best Available options visually and decide the best eligible candidates. You can view all of the available options and view the options (style/color) included in the Assortment mix. You can view the ranking of the options and add (Using +) in the card view of the Available Options section to move the option to the shopped options section of the view. The Available Options section of the view contains the list of all Style/colors available for the subcategory, Assortment period, and Store Cluster.

You can also toggle between the different measure selections per card definitions and view the assortment visually per your needs to analyze the different measure values/attributes. You can also use attribute filtering/sorting to view the style-colors of the attributes you want for analysis. You can also use Special filters and define/save attribute filters at once up to five attributes and their values. These saved filters can be applied in conjunction with special filters that enhance the filtering.

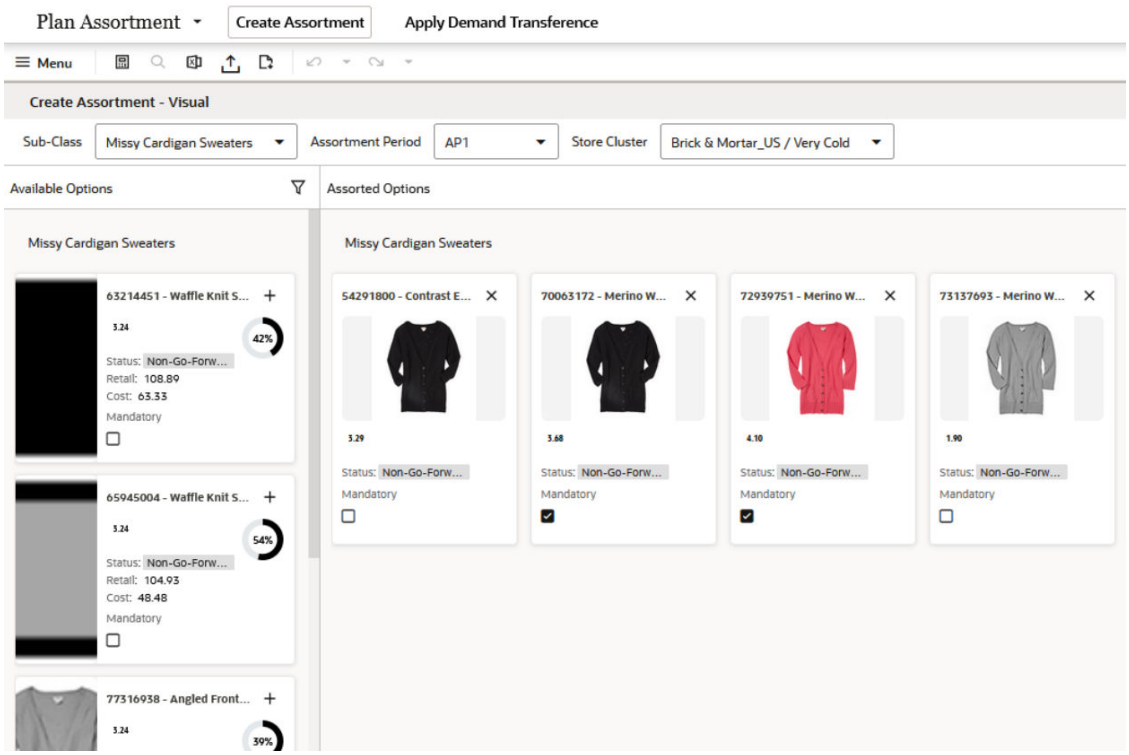
You can remove (Using X) in the card view of shopped options section to move the option to the available options section of the view. There is also a summary section with an option to toggle between Total and To Target. When toggled for Total, the total options are compared to the target selected options. When toggled to the To Target, the selected options in the shopped options section are compared against the status of the options planned and shown accordingly.

The following chart shows the % of options selected in the shopped options to the targeted total options.

The steps to complete this process:

- Select/modify/delete the options into/from the shopped options.
- Select the card definitions to view the measures/attributes as needed for your analysis.
- After any modifications, click the calculate action menu and review the summary of the data.

Figure 9-18 Review Assortment Recommended - Visual View



Measure Table

Table 9-15 Review Assortment Recommended - Visual View Measures

Label	Definition
Assorted Option	Measure to select whether the option should be included in the working plan assortment.
Available Option	Measure to show all the available options.
Status	Auto-generated Status of the option selected.
WP Option Rank	Working Plan options ranking given to the style/color using the attribute ranking.
Mandatory	Boolean checkbox to indicate if the option is mandatory and to be included in the assortment.
On Hand U	On hand inventory units.
New/carryover Options count	The option count for new or carryover status.
WP Total Option Count	Working Plan Total options calculated at the Subclass level or higher.
New Options diff to Tgt +/-	Difference between the new options considered to the targeted new options.
Carryover Options diff to Tgt +/-	Difference between the carryover options considered to the targeted carryover options.
Total Options diff to Tgt +/-	Difference between the total options considered to the targeted options.
Tgt New/carryover/Max Options	The working plan target new, carryover, and maximum options.

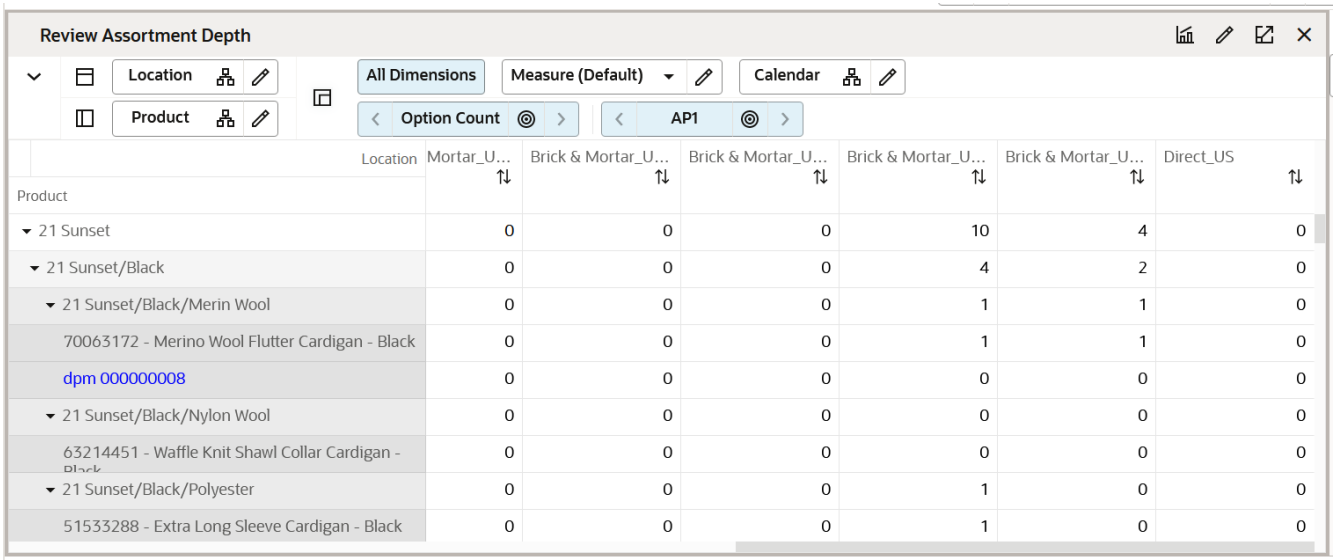
Table 9-15 (Cont.) Review Assortment Recommended - Visual View Measures

Label	Definition
New/Carryover/ WP Total Option Count	The new, carryover, total options considered in the working plan.

Review Assortment Depth View

This view allows you to review the depth of assortments by reviewing the option count by product attributes of assorted options. Nested dynamic product rollup allows you to group and create subgroups allowing you to review metrics at the most granular product attribute level.

Figure 9-19 Review Assortment Depth View



Measure Table

Table 9-16 Review Assortment Depth View Measure

Label	Definition
Option Count	Total count of assorted options

Time Phased Visual Assortment View

The Time Phased Visual Assortment view helps you with a high-level view of the assortment at the period level with visual images of style/colors. Once you have created a style-color level assortment in the Recommend Assortment view, the Time Phased view step is used to review the assortment pictorially (in the form of product images). This facilitates an image-based review of the assortment plan being created, which can help to make your job more efficient. After reviewing the assortment at the style-color level in this view, you can return to the Recommend Assortment view to make changes to the assortment, as per business requirements.

The style-color level assortment can be viewed at the assortment period/cluster level. The Buyer can use the special filter to view the Visual Assortment.

The step to complete this process:

- Review the Visual Assortment across the Time phase of the Assortment Period.

Measure Table

Table 9-17 Time Phased Visual Assortment View Measure

Label	Definition
Visual Assortment	Display the associated style/color image for the assigned flow weeks.

Measure Profile

Default Profile

The Default profile is used to review the Visual Assortment for the assortment period and cluster.

Define Product Rollup View

The Define Product Rollup view is used to select product attributes to view in an alternate hierarchy. This is available in the tab to display the item level.

Three groups of product attributes are provided with three levels in each group to enable nesting of plans by attributes that are important to you.

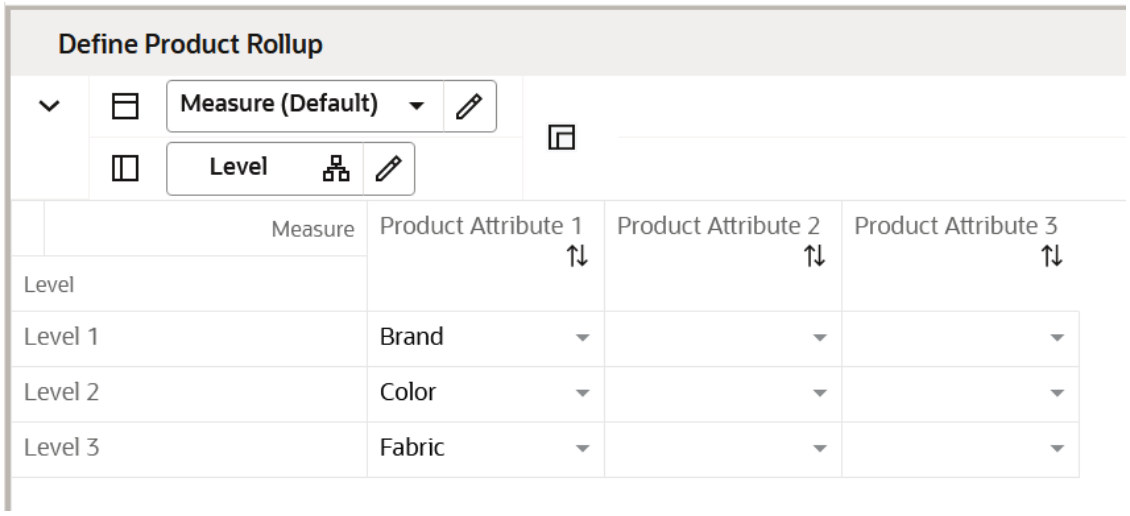
For example, for combination 1, you select Brand as Level 1, Color as Level 2, and Fabric as Level 3 by clicking the list of attributes available in that category. You will be able to review plans grouped by brands, then grouped by color within each brand, and then by fabric within each color. If there are editable measures in the view, this feature allows you to view/edit subtotals at each nested level to spread the values to all the child positions.

This allows you to rollup your items by different attributes to analyze and review the proposed assortment based on important attributes. You may select up to three attributes at a time for one group for the nested dynamic rollup.

The steps to complete this process:

- Select up to three levels of dynamic product attributes from the drop-down list.
- Run the Refresh Product Rollup Application Action.
- To view the product attribute:
  - In a view that displays the item level, click the Product Hierarchy tile.
  - Select the attribute (Attribute 1, 2, or 3 level 1) that you would like to view in the dynamic rollup.
  - Click **OK**.

Figure 9-20 Define Product Rollup View



Measure Table

Table 9-18 Define Product Rollup View Measure

Label	Definition
Level 1, 2, 3	Drop-down list to present product attributes for nested dynamic product hierarchy rollup.

Measure Profile

Default Profile

The Default profile is used to select dynamic product attributes.

Demand Transference Tab

In the Demand Transference tab, you run the Demand Transference (DT) engine to understand the substitutable sales and unique sales of an item. This information can be leveraged to make informed decisions about what items can be substituted if the primary item runs out. Demand Transference uses Product elasticity and Attribute weights provided by the AI Foundations and the individual ROS across each location to determine the most profitable options providing wide variety of assortments to the customers.

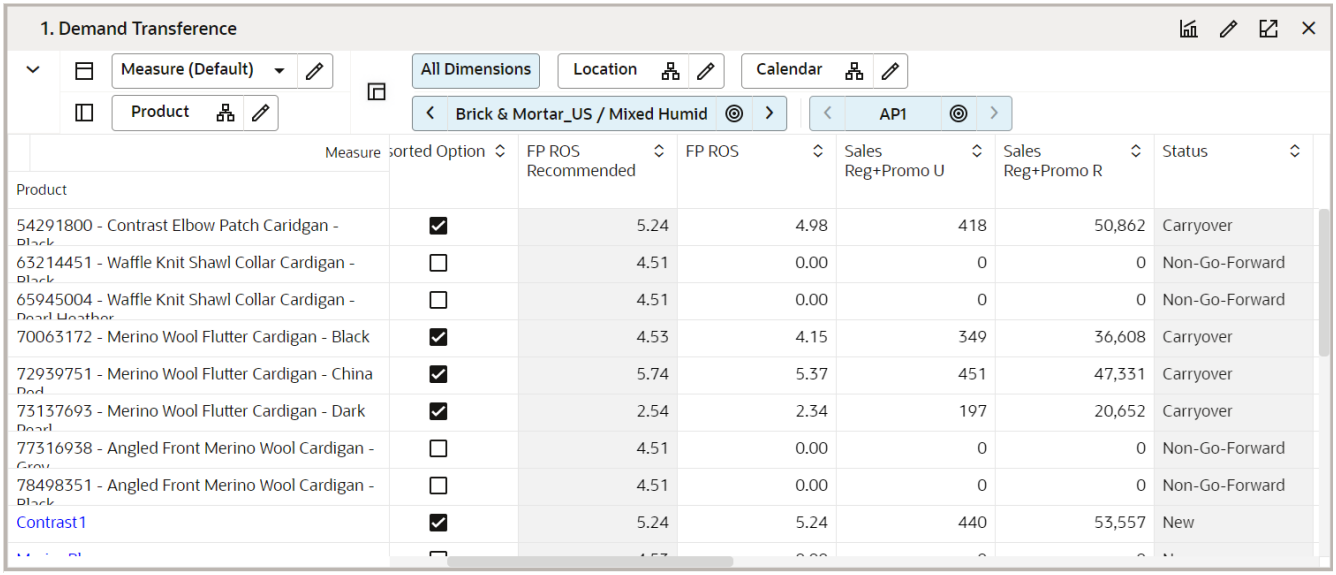
Demand Transference View

Leverage Demand Transference to review the assortments for Substitutable demand or Unique demand of an item by using AI Foundation and automation. This information can be leveraged to make informed decisions about what items can be substituted if the primary item runs out. DT uses Product elasticity and Attribute weights provided by the AI Foundations and the individual ROS across each location to determine the most profitable options providing wide variety of assortments to the customers. You can view the corresponding sales of each of the assorted options. The view contains the list of all styles or colors available for the subclass, Assortment Period, and Cluster.

The steps to complete this process:

- Check the Boolean Run DT at the subcategory or higher level for the chosen assortment period, store cluster, and higher.
- Click **Calculate** and run the planning action Run DT.
- On the successful completion of the planning action, the DT set of measures will show the optimized sales values for each of the assorted options.
- If you are happy with the DT recommendations, you can select the Accept DT Boolean at the subcategory or higher level and run the planning action, Accept DT to incorporate DT recommendations into the assortment.

Figure 9-21 Demand Transference View



Measure Table

Table 9-19 Demand Transference View Measures

Label	Definition
Run DT	Select this Boolean measure to run the Demand Transference engine.
Assorted Option	Editable Boolean measure signifying if a particular option is assorted or not.
FR ROS Recommended	Full Price weekly Rate of Sales Recommended.
FP ROS	Working Plan Full Price weekly Rate of sales.
Sales Reg+Promo U	Full Price Sales units.
Sales Reg+Promo R	Full Price Sales Retail.
Status	Status of the item signifying if it is a New, Carryover, or a non-go forward item.
Status Override	Editable measure to override the status of the item.
DT K/A/D	DT measure equivalent to the status of an item having three statuses of Keep, Add, or Drop.

Table 9-19 (Cont.) Demand Transference View Measures

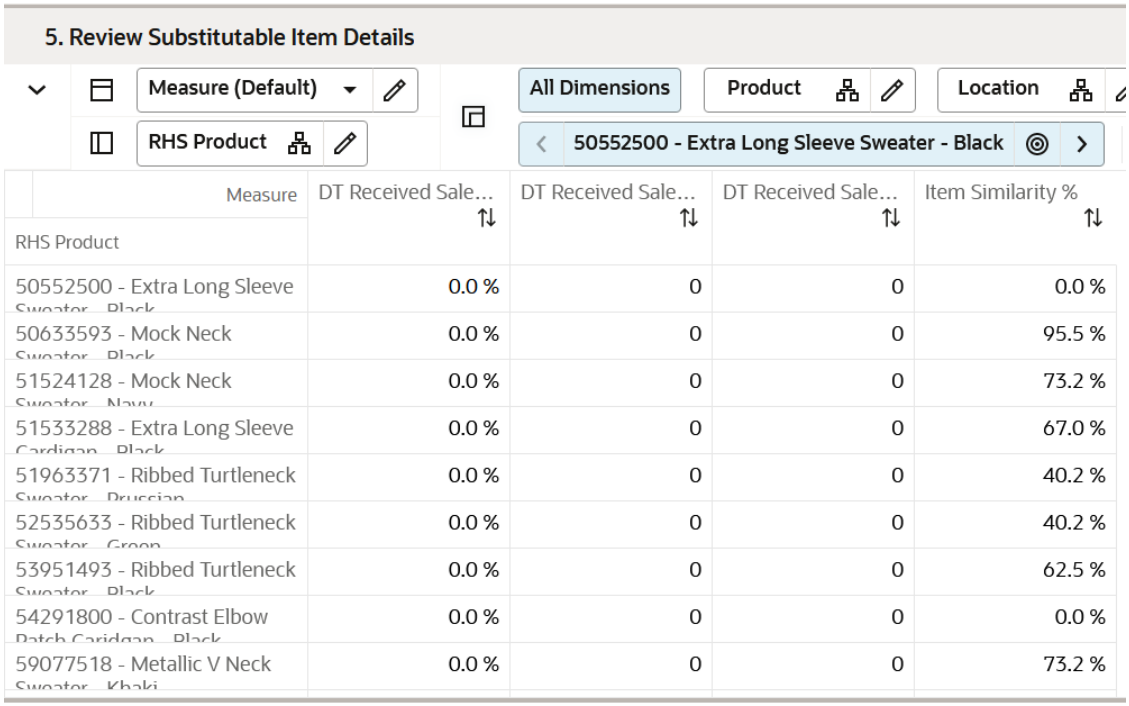
Label	Definition
DT ROS	DT weekly rate of sales.
DT Sales U	DT recommended optimized Sales Units.
DT Sales R	DT recommended optimized Sales Retail.
DT Incremental Sales U	DT calculated Sales Units unique to the option. The incremental sales of an option cannot be transferred to any other option if this option is dropped.
DT Incremental Sales R	DT calculated Sales Retail unique to the option. The incremental sales of this option cannot be transferred to any other option if this option is dropped.
DT Substitutable Sales U	DT calculated substitutable Sales Units. If the option is dropped, sales can be recovered by transferring the demand for this option to a substitutable option.
DT Substitutable Sales R	DT calculated substitutable Sales Retail. If the option is dropped, sales can be recovered by transferring the demand of this option to a substitutable option.
DT Substitutable Sales %	Percent of the substitutable sales of an option.
DT No. of significant substitute items	The number of options that can act a substitute to fulfill the demand of a dropped item.
Accept DT	Boolean measure to accept the DT recommendations.

Review Substitutable Item Details View

The Review Substitutable Item Details view is a read-only view for information only. This view is used to review the items that can act as a substitute item for a product. This gives you visibility to all the products that can consume the demand of a selected item and by what percentage. The RHS Product tile lists the substitutable items.

In the following figure, item 63214451 - Waffle knit Shawl Collar Cardigan - Black can act as a substitute item to replace item 54291800 - Contrast Elbow-patch Cardigan - Black if 54291800 gets dropped. The DT Received Sales %, U, R measure represents the demand that will be consumed by the substitutable item if the initial product is dropped. The Item Similarity % measure shows the percentage of similarities between both items. This view helps you to make an informed decision while accepting DT recommendations.

Figure 9-22 Review Substitutable Item Details View



Measure / RHS Product	DT Received Sale...	DT Received Sale...	DT Received Sale...	Item Similarity %
50552500 - Extra Long Sleeve Sweater - Black	0.0 %	0	0	0.0 %
50633593 - Mock Neck Sweater - Black	0.0 %	0	0	95.5 %
51524128 - Mock Neck Sweater - Navy	0.0 %	0	0	73.2 %
51533288 - Extra Long Sleeve Cardigan - Black	0.0 %	0	0	67.0 %
51963371 - Ribbed Turtleneck Sweater - Prussian	0.0 %	0	0	40.2 %
52535633 - Ribbed Turtleneck Sweater - Green	0.0 %	0	0	40.2 %
53951493 - Ribbed Turtleneck Sweater - Black	0.0 %	0	0	62.5 %
54291800 - Contrast Elbow Patch Cardigan - Black	0.0 %	0	0	0.0 %
59077518 - Metallic V Neck Sweater - Khaki	0.0 %	0	0	73.2 %

Measure Table

Table 9-20 Review Substitutable Item Details View Measures

Label	Definition
DT Received Sales %	Measure displaying the percent of demand covered if the assorted item is dropped.
DT Received Sales U	Measure displaying the number of units of lost demand covered if the assorted item is dropped.
DT Received Sales R	Measure displaying the Sales Retail amount covered if the item is dropped.
Item Similarity %	Percent similarity between the assorted item and the possible substitute item.

Assortment Optimization Tab

The Assortment Optimization engine enables you to add, remove, or swap a specified percentage of options to optimize Sales U, Sales R and Gross Margin. Also, Assortment Recommendation engine enables you try out several different assortments to find one that best meets the goals of the assortment. For example, find the assortment that maximizes Sales U or Sales R or meets MFP Targets for a fixed number of products. if you choose to run optimization logic to meet MFP Targets, built-in science makes the decision to add, remove, or swap the current assortment to meet the MFP target.

Set Optimization Parameters View

The Set Optimization Parameters view is used to set the desired parameters to run the Assortment optimization engine. There are four optimization operations:

- Add
- Swap
- Remove
- MFP Target

The Boolean, **Include for Optimization**, allows you to select the required clusters for Assortment Optimization. **Number of Options to Add or Remove** allows you to specify the maximum number of options to be added or dropped during Assortment Optimization. The next measure, **Max % of Assortment to Impact**, allows you to specify the maximum percentage of assortment that you would like to swap for better performing assortments. The **Max % of Assortment to Impact** measure should be used with **Swap** option only. The drop-down list measure, **Metric to Optimize**, allows you to specify one of the three metrics of **Sales U**, **Sales R**, and **Gross Margin** to specify for optimization.

Add

For a given subclass, assortment period, and store cluster, if there are four assorted options, then select the:

- Boolean, **Include for Optimization**, that specifies the optimization parameter as **Add**
- Number 50 for the **Max % of Assortment to Impact**
- Metric to optimize as **Sales U**

When running the Run Optimization planning action, the Assortment Optimization engine will try to add a maximum of the two best-selling options to the existing assortment mix, taking the total number of assorted options to six.

If the Assortment Optimization engine fails to find high-performing options, nothing will be added and the number of assorted options continues to remain at four.

Swap

For a given subclass, assortment period, and store cluster, if there are four assorted options, then select the:

- Boolean, **Include for Optimization**, that specifies the optimization parameter as **Swap**
- Number *50* for the **Max % of Assortment to Impact**
- Metric to optimize as **Sales U**

When running the Run Optimization planning action, the Assortment Optimization engine will try to add a maximum of the two best selling non-assorted options and remove two of the low-performing options from the existing assortment mix, taking the total number of assorted options to four.

If the Assortment Optimization engine fails to find high-performing options, nothing is swapped and the number of assorted options continues to remain at four.

Remove

For a given subclass, assortment period, and store cluster, if there are four assorted options, then select the:

- Boolean, **Include for Optimization**, that specifies the optimization parameter as **Remove**
- Number *2* for the **Number of Options to Add or Remove**
- Metric to optimize as **Sales U**

When running the Run Optimization planning action, the Assortment Optimization engine will try to drop the two lowest selling options to the existing assortment mix, taking the total number of assorted options to two.

MFP Target

For a given subclass, assortment period, and store cluster, if there are four assorted options, then select the:

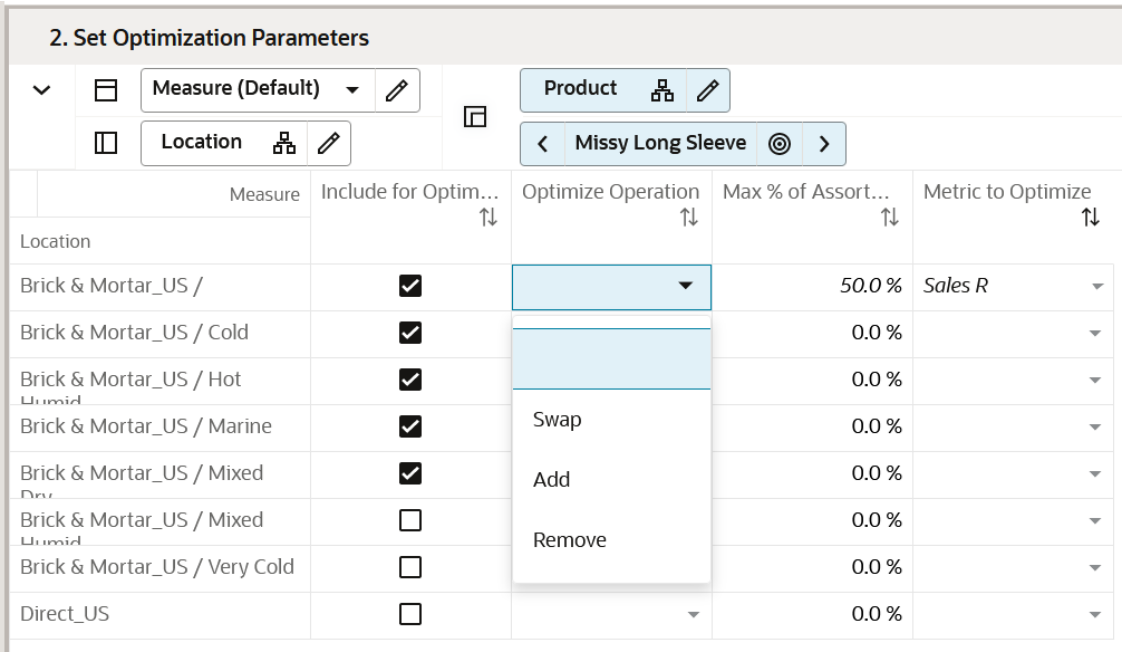
- Boolean, **Include for Optimization**, that specifies the optimization parameter as **MFP Target**
- Number *50* for the **Max % of Assortment to Impact**
- Metric to optimize as **Sales U**

When running the Run Optimization planning action, the DT engine will swap a maximum of two options to meet the MFP Targets.

The steps to complete this process:

- Set the optimization parameters.
- Click **Calculation** and run the Run Optimization planning action.
- After a successful run of the planning action, verify the results in the Review Assortment Results view.

Figure 9-23 Set Optimization Parameters View



Measure Table

Table 9-21 Set Optimization Parameters View Measures

Label	Definition
Include for Optimization	Boolean flag measure that when selected includes a particular cluster or channel across a chosen subclass and assortment period to run the Run Optimization planning action that runs the Assortment Optimization engine.
Optimize Operation	A drop-down list measure having four values of Swap, Add, Remove, and MFP Target to perform one of the four operations.
Max % of Assortment to Impact	Editable measure carrying the value of Maximum % of initial assortment to be impacted by the DT Optimization engine. The optimization results will always be less than or equal to the percent mentioned in this measure. If optimization fails to find any better recommendations, there will not be any changes to assortments.
Metric to Optimize	One of the three metrics of Sales U, Sales R, and Gross Margin that can be optimized using the optimization engines.

Application Action

Run Optimization

The Run Optimization Application Action is used to run the Demand Transference Optimization engine.

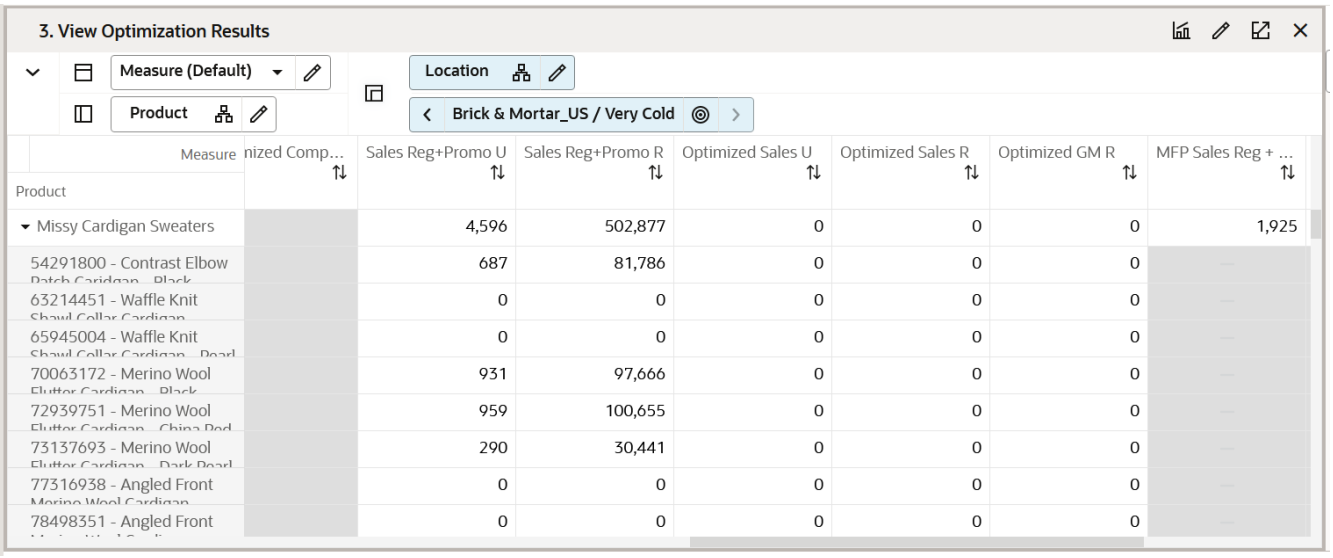
View Optimization Results View

The View Optimization Results view is used to verify the results after the execution of the Run Optimization Application Action for a given subclass/cluster/Assortment period. The measure DT Recommended is a Boolean that shows if a particular option must be considered for an assortment or not. The Optimized Compare to Assorted measure shows whether a particular option should be continued (Keep), Added (Add), or removed (Drop) from the assortment to meet the assortment goals of maximizing one of the Sales U, Sales R, Gross Margin, or meeting MFP Targets. If you like the DT recommendations, select the Boolean Accept Optimization and run the Accept Optimization Application Action to incorporate the recommendations.

The steps to complete this process:

- Review the recommendations.
- Review the sales numbers.
- If you like the result, select the Boolean Accept Optimization subcategory or higher level for the chosen assortment period, store cluster, and higher.
- Click **Calculate** and run the Accept Optimization Application Action to incorporate DT recommendations into the assortment.

Figure 9-24 View Optimization Results View



Measure Table

Table 9-22 View Optimization Results View Measures

Label	Definition
Accept Optimization	Select Boolean measure to run the Accept Optimization planning action at the subclass level and higher to accept DT Recommendations.
DT Recommended	The Boolean measure that is marked as True if the Style-color is a recommendation by the DT engine.
Assorted Option	Editable Boolean measure to select as an option or an assorted option.
Option Count	Integer measure that gets one added for every assorted option to be able to give the total number of assorted options at aggregated levels.
Optimized Option Count	Integer measure that gets one added for every DT final recommended option showing the total number of options at aggregated levels as a result of DT.
Optimized Compare to Assorted	String measure having the drop-down list of Keep, Add, and Drop showing the status of a DT recommendation in comparison with the non-DT plan.
Sales Reg+Promo U	Sales Unit value of Full price items is the sum of regular and promotional sales.
Sales Reg+Promo R	Sales Retail value of Full price items which is the sum of regular and promotional sales.
Optimized Sales U	Sales Units recommended by DT after the execution of the Run Optimization planning action.
Optimized Sales R	Sales Retail recommended by DT after the execution of the Run Optimization planning action.
Optimized GM R	Gross Margin Retail recommended by DT after the execution of the Run Optimization planning action.
MFP Sales Reg + Promo U	Full Price Sales Unit Values from MFP at Subclass and higher.

Table 9-22 (Cont.) View Optimization Results View Measures

Label	Definition
MFP Sales Reg + Promo R	Full Price Sales Retail Values from MFP at Subclass and higher.
MFP GM R	Gross Margin Retail Value from MFP at Subclass and higher.

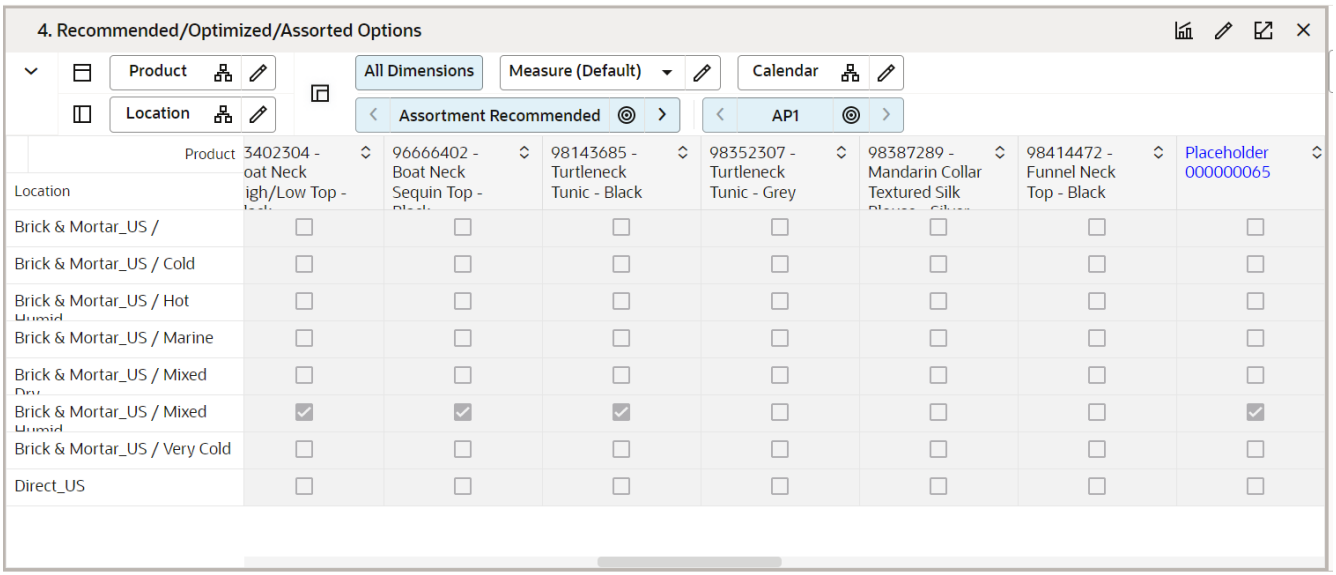
Recommended/Optimized/Assorted Options View

The Recommended/Optimized/Assorted Options is a read-only view to allow you to review the difference recommendations and the final assorted options. This view has three Boolean measures that signify the recommendations and final assortment decision across each cluster for a given style-color. This helps you to analyze what clusters with a particular style-color have been recommended.

The step to complete this process:

- Review the Boolean recommended Assortment versus the Optimized versus the assorted options across all clusters for a chosen style-color.

Figure 9-25 Recommended/Optimized/Assorted Options View



Measure Table

Table 9-23 Recommended/Optimized/Assorted Options View Measures

Label	Definition
Assortment Recommended	Boolean Measure Recommended by the Assortment Recommendation Engine.
Assorted option	Boolean measure signifying if a particular option is assorted or not. This is the final assorted measure.

Step 3: Plan Buy Quantity

In this step, you plan the buy quantities for each of the assorted options. Buy quantity is planned using the Sales Target and the Sell Through percent.

If you are planning Basic Style Colors based on the planned life cycle of the item, the Buy quantity can be planned in one go for the entire life cycle in one assortment period. In the subsequent assortment periods, this item will be carried forward automatically as a basic-carryover item and basic Reg+promo Sales U will have the on hand from the end of the previous assortment period. This enables you to make the appropriate decision on the buy quantity.

Tabs and Views in this Step:

- **Plan Buy Quantity Tab:**
  - Plan Buy Quantity - Table View
- **Plan Buy Quantity By Size Tab:**
  - Seed Size Profile View
  - Review Size Profile View
  - Review Buy Quantity by Size View

Application Action

Seed Size Profile

The Seed Size Profile Application Action allows you to choose the source and seed size profile from the available Admin created size profile or size profile loaded from profile science from AIF or any other size profile and optimization source.

Apply Size Profile

The Apply Size Profile Application Action allows you to apply the seeded and normalized size profile to the buy quantity to break down Buy Quantity by size and is saved as the store level. Each of the buy quantity by size is also rounded by pack size information to allow you to extract the information and initiate Purchase order creation by an execution system.

Plan Buy Quantity Tab

This tab is used to manage plan buy quantities and an optional step of splitting Buy Quantity by size based on the size profiles available.

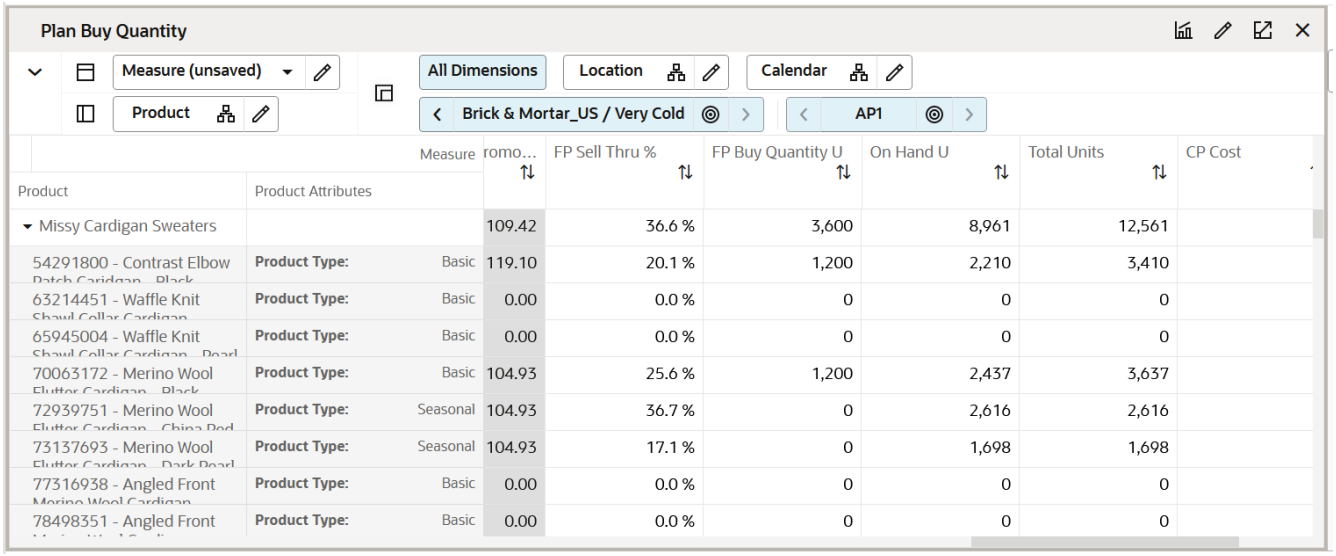
Plan Buy Quantity - Table View

The Plan Buy Quantity - Table view is used to build the buy plan based on the assortment created in the Plan Assortment tab.

The step to complete this process:

- Plan buy quantities using the target sales and sell through percent.

Figure 9-26 Plan Buy Quantity - Table View



Measure Table

Table 9-24 Plan Buy Quantity View- Table View Measures

Label	Definition
Assortment Recommended	Boolean measure to show the Assortment recommendations after running the Assortment Recommendation.
Assorted Option	Boolean measure to show the final assortment.
Mandatory	Boolean checkbox to indicate if the option is mandatory and to be included in the assortment.
FP ROS Recommended	Full Price weekly rate of sales recommended by automation logic.
Sales Reg+Promo U Recommended	Full Price sales Units recommended by automation.
CP Sales Reg+Promo U	Current Plan full Price sales Units.
FP ROS	Planned Full Price weekly Rate of Sales.
Sales Reg+Promo U Var Rec %	Full Price Sales Units Variance to Receipts Percentage.
Sales Reg+Promo U, R, AUR	Full Price Sales Units, Retail, Average Unit Retail planned for the style-color.
Full Price Buy Quantity U	Full Price Buy Quantity Units planned for the style-color.
LY/LA FP Sell Thru %	The Last Year/Last Assortment Full Price Sell Through percentage that is editable by the planner.
On Hand U	The on hand inventory units that exist in the location cluster.
Total Units	The total units of the inventory clubbing the existing on Hand Units and buy quantity.

Plan Buy Quantity By Size Tab

This tab is used to split the Buy Quantity by size based on the size profiles available.

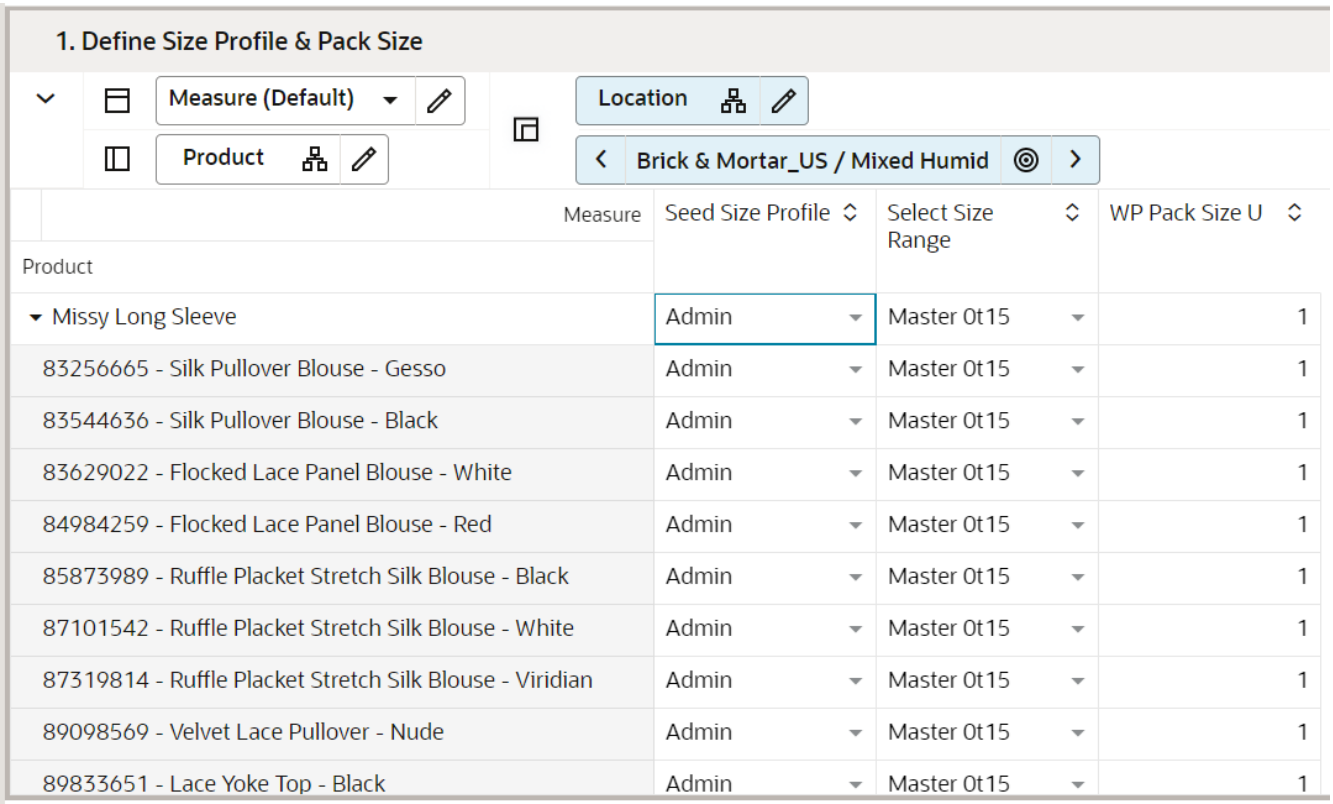
Seed Size Profile View

The Seed Size Profile view is used to seed the size profiles to split the Buy Quantity by Size. You have the option to seed the size profile from two sources. Seed from Admin will seed the size profile from Admin Size Profile % loaded by Admin or manually created by Admin. Seed from SPO will seed the size profile from the profile received from AI Foundation or any other external size profile and optimization engine. You are also allowed to set the pre-packs information for each size in the Wp Pack Size U measure. You should have determined the Buy Quantity before running this step.

The step to complete this process:

- Choose the seed source from any of the available sources and run the Application Action, Seed Size Profile.

Figure 9-27 Seed Size Profile



Measure Table

Table 9-25 Seed Size Profile - Table View Measures

Label	Definition
Seed Size Profile	Drop-down list measure to allow the planner to select the size profile source.
Select Size Range	Drop-down list showing available size ranges.

Table 9-25 (Cont.) Seed Size Profile - Table View Measures

Label	Definition
Wp Packsize U	Prepack information to round off the buy quantity by size to pack size. If no packsize is specified, it defaults to 1.

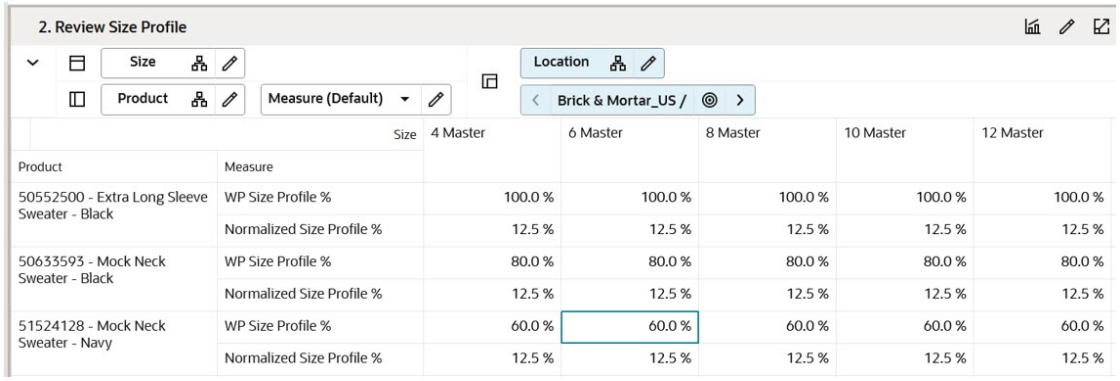
Review Size Profile View

The Review Size Profile view is used to review the selected size profiles. The view has the measure Wp Size Profile to show the percentage size split generated by the seeding action. This is further normalized to add up to 100 percent and can be viewed in the Normalized Size profile % measure.

The step to complete this process:

- Review the Wp Size Profile % and Normalized Size Profile % measures to understand the size split percentage across each of the available sizes in the size range

Figure 9-28 Review Size Profile



Product	Measure	4 Master	6 Master	8 Master	10 Master	12 Master
50552500 - Extra Long Sleeve Sweater - Black	WP Size Profile %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %
	Normalized Size Profile %	12.5 %	12.5 %	12.5 %	12.5 %	12.5 %
50633593 - Mock Neck Sweater - Black	WP Size Profile %	80.0 %	80.0 %	80.0 %	80.0 %	80.0 %
	Normalized Size Profile %	12.5 %	12.5 %	12.5 %	12.5 %	12.5 %
51524128 - Mock Neck Sweater - Navy	WP Size Profile %	60.0 %	60.0 %	60.0 %	60.0 %	60.0 %
	Normalized Size Profile %	12.5 %	12.5 %	12.5 %	12.5 %	12.5 %

Measure Table

Table 9-26 Review Size Profile - Table View Measures

Label	Definition
WP Size Profile %	This measure shows the percentage split across each size as generated by the seed source action.
Normalized Size Profile %	This measure shows the normalized size profile.

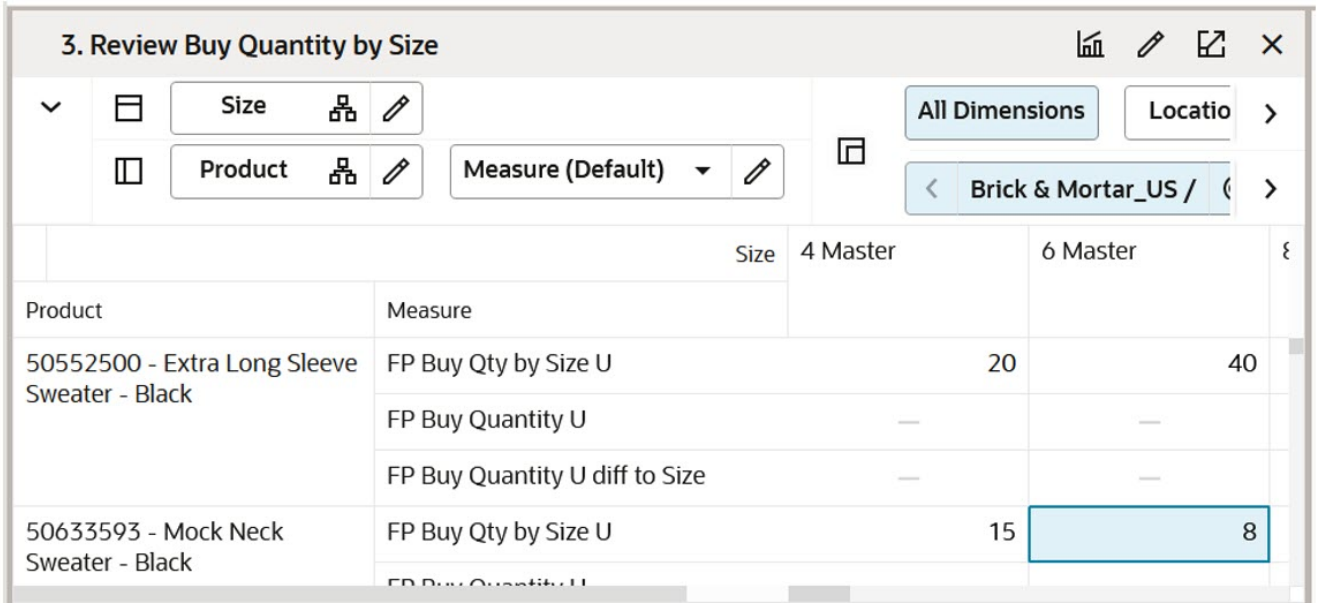
Review Buy Quantity by Size View

The Review Buy Quantity by Size view is used to review the Buy quantity by the percentage split of sizes. The view has the measure FP Buy Quantity U to show the initial/planned Full Price Buy Quantity Units. FP Buy Quantity by Size U is the final Buy quantity after splitting the initial Buy quantity by size and then rounding it by pack size information.

The step to complete this process:

- Review the FP Buy Quantity U %, FP Buy Quantity by Size U, and the difference between the two.

Figure 9-29 Review Buy Quantity by Size



Measure Table

Table 9-27 Review Buy Quantity by Size - Table View Measures

Label	Definition
FP Buy Quantity U	Planned Full Price Buy Quantity Units showing the Buy Quantity.
FP Buy Quantity by Size U	Full Price Buy Quantity split by size and rounded by the pre-pack size.
FP Buy Quantity U diff to Size	Difference between the planned Buy Quantity and Buy Quantity split by size and rounded to pack size.

Step 4: Approve

The next step in the Assortment Planning process is Approve. This step approves the assortment that you have created and reviews it for accuracy.

The output of this step is an approved Assortment Plan which can be brought into the Item Planning process or sent to the Oracle Retail Allocation and Order Management System or similar for purchase order creation.

Tab and Views in this Step:

- **Approve Tab:**
  - Approve Plan View

Application Action

Approve

The Approve Application Action approves the planned assortment for the selected subcategory.

Approve Tab

This process converts the Working Plan decisions regarding start/end dates, prices, descriptions, and attributes into Current Plan versions of the Working Plan measures. The Current Plan versions should be used for external reporting and so on.

This process can be completed more than once if the Assortment requires additional changes after it has been approved. The Working Plan version will overlay the Current Plan version if approved again.

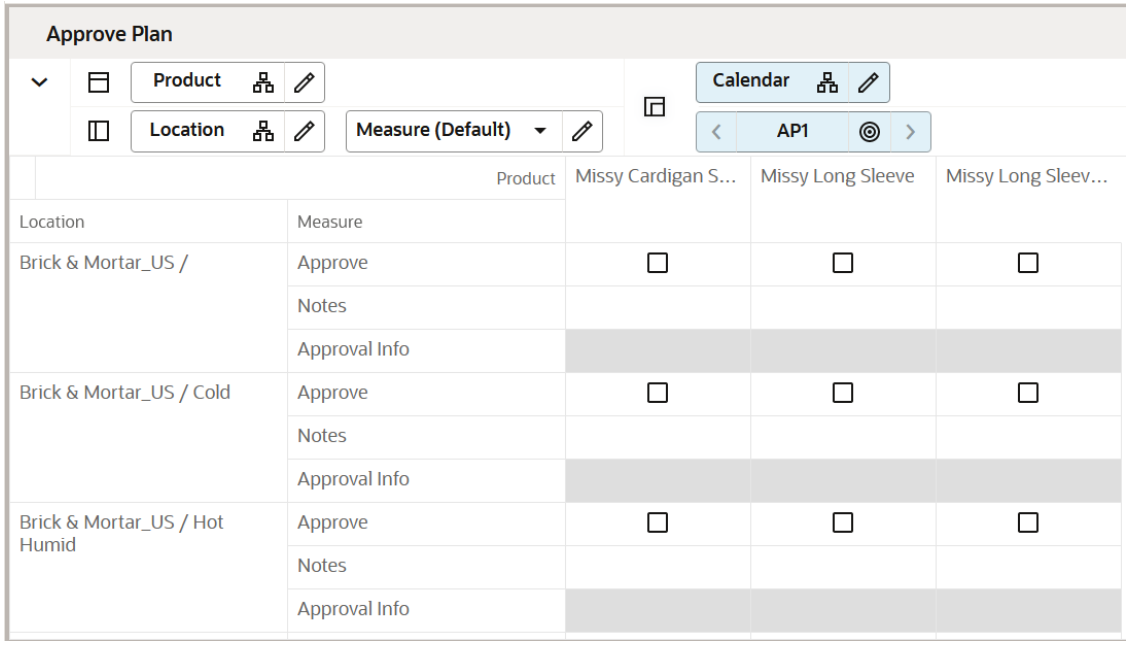
Approve Plan View

In this view, the Buyer or Planner selects the subcategories to be approved and enters any approval notes (optional) and then clicks **Approve Plan** to copy the Working Plan version of the measures into the Current Plan version of each measure.

The steps to complete this process:

- In the Approve measure, select the Boolean flag for the subcategory and higher levels that should be approved. If all products should be approved at once, rollup to All Product and All Location and select the Approve measure at that level.
- In the Notes measure, enter approval comments.
- Run the Approve Application Action.

Figure 9-30 Approve Plan View



Measure Table

Table 9-28 Approve Plan View Measures

Label	Definition
Approve	Boolean flag measure required to be checked to approve the Assortment Plan.
Notes	Used to enter approval comments.
Approval Info	Provides information about the most recent plan approval.

Measure Profile

Default Profile

The Default profile is used to approve the Assortment plan.

Application Action

Approve

The Approve Application Action approves the planned assortment for the selected subcategories.

Step 5: ASO-AP Integration

The optional step in the Assortment Planning process is integration with ASO. Oracle AI Foundation Assortment and Space Optimization Cloud Service (ASO) is used to determine the optimal selection and arrangement of products within stores by optimizing the product assortment and product placement on a virtual planogram. Integration of Assortment Planning solution with the ASO will provide the most optimal assortment planning considering the space constraints.

With this plug-in, AP creates the initial Assortment Plan. This plan is integrated with ASO for Assortment and Space Optimization. Once optimized, ASO plans are imported back into AP at store level. Users review and manage exceptions and finalize Assortment plans. If the delta between AP initial plan and the ASO recommended plan is too high, the plan from AP will go through another round of optimization and recommendation is sent back to AP.

AP sends the final Assortment plan to ASO which will share the plan with space planning solution.

Tab and Views in this Step:

- **ASO Evaluation Tab:**
  - Export/Request to ASO View
  - ASO Evaluation View
  - Approve Plan View

Application Action

Export to ASO

The Export to ASO Application Action exports the Assortment Plan for the selected subcategory to ASO for Space optimization.

Request to ASO

The Request to ASO Application Action Requests to ASO to send the space optimized Assortment Plan for the selected subcategory.

Approve ASO Plan

The Approve Application Action approves the final assortment for the selected subcategory to send the plans to ASO and Item Planning.

ASO Evaluation Tab

This process has been introduced as an additional step after the Approve step to leverage the optional ASO Integration. With this step, planner will be able to send Assortment Plans to ASO for Space Optimization. If the planner stops at the Approve tab in AP, the approved plan at store cluster level will flow down as currently to IP and planning in IP will remain at the cluster level. Otherwise, space optimized plans, reviewed and approved in AP will flow down to IP at the space cluster level.

ASO Evaluation occurs by the planner comparing different versions with various process steps, including:

- **Exporting to ASO**: Moves the assortment plan Original Plan (OP) version to ASO application for optimization.
- **Request to ASO**: Moves the optimized ASO plans back to the AP application at the store level.
- **Accept ASO**: Updates the Working Plan (WP) version with ASO data to allow review and modification.
- **Approve ASO Plan**: Updates the Current Plan (CP) from the Working Plan but will leave the OP untouched. After approving ASO, key metrics may differ between the OP and the CP.

Export/Request to ASO View

In this view, the Planner runs two distinct process. First, the planner sends the Assortment Plan to ASO. To send the approved OP assortment plan to ASO, the planner sets the Export to ASO flag to true for a subcategory and clicks the custom menu Export to ASO. The initial assortment plan exported to ASO will be the Original Plan version.

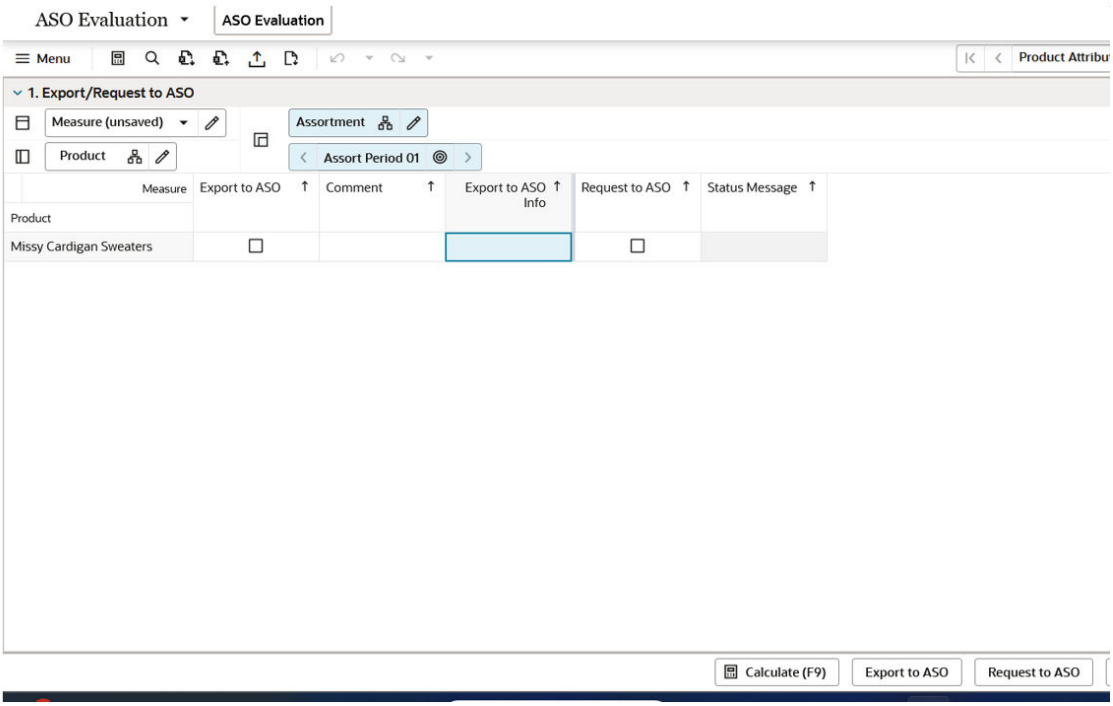
Once the ASO recommendations are completed, the planner returns to AP and requests the updated ASO plan to review and compare the differences between AP and the ASO version. The import the ASO version, the planner sets the **Request to ASO** flag to True for a subcategory and clicks the custom menu **Request to ASO**. The planner reviews these plans in the ASO Evaluation View by Accept ASO custom menu which moves the ASO plan data into the Working Plan (WP).

> **Note:**
>
> Only one subcategory can be exported to ASO at a time. To export multiple subcategories, run the process steps individually for each subcategory.

The steps to complete this process:

- To export: Set the **Export to ASO** Boolean measure to True for a subcategory and click the custom menu, **Export to ASO**.
- To import: Set the **Request to ASO** Boolean measure to True for a subcategory and click the custom menu, **Request to ASO**.

Figure 9-31 Export/Request to ASO View



Measure Table

Table 9-29 Approve Plan View Measures

Label	Definition
Export to ASO	Boolean flag measure required to be checked to send Initial Assortment Plan to ASO for Space Optimization.
Export to ASO info	Used to enter comments.
Request to ASO	Boolean flag measure required to be checked to Receive the Space Optimized Assortment Plan from ASO to AP.
Status Message	Provides information about the user ID and Date.

Measure Profile

Default Profile

The Default profile is used to Export and Receive plans to and from ASO.

Application Action Export to ASO

The Export to ASO Application Action Exports the planned assortment to ASO for the selected subcategories for Space Optimization.

Request to ASO

The Request to ASO Application Action imports the optimized assortment plans from ASO to the selected subcategories for Space Optimization.

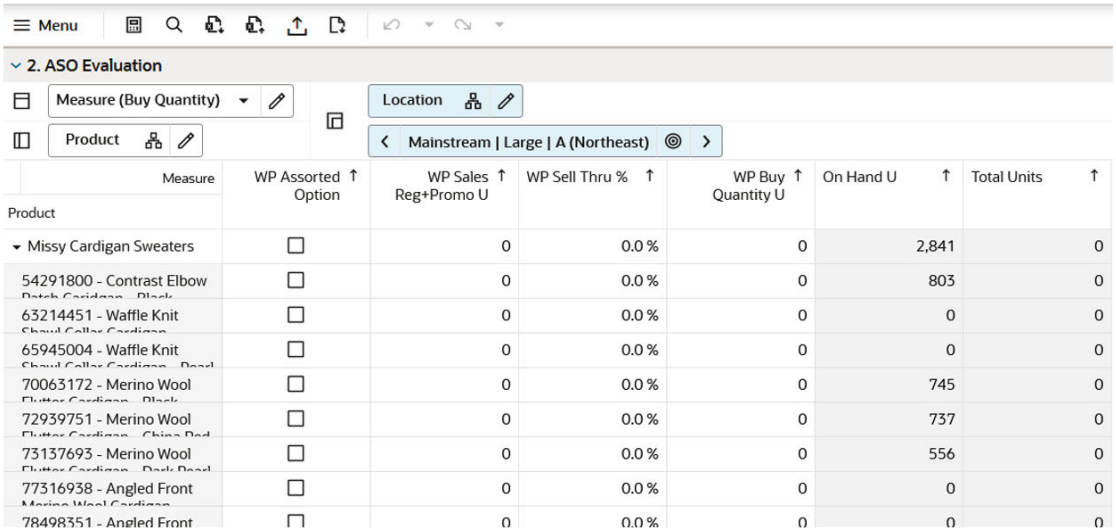
ASO Evaluation View

In this view, the Planner reviews the Optimized plans from ASO and make any edits if required. To review the Assortment plan from ASO, planner should run the custom menu, **Accept ASO**. Once this is run, the ASO Plan is copied to Working Plan measures. The view is at style-color/space cluster level. ASO Assorted and ASO Sales Reg+Promo U is interfaced into AP and remaining metrics are calculated. If ASO recommends an item to be dropped, then WP Sales Reg+Promo U are zeroed out for that item. The Sell Through % defined at the Store cluster level is inherited and used to calculate the Buy Quantity at Space cluster level for the latest sales plan created at Space Cluster level. Optionally, both Buy Quantity and Sell Through % are editable at individual space cluster level.

The steps to complete this process:

- Run the custom Menu **Accept ASO** and review the Assortment Plans Optimized for Space from ASO.
- Adjust the plans if needed.
- Review the Sell Through% and Buy Quantity based on the Sell Through % set in the Buy Quantity Planning step.

Figure 9-32 ASO Evaluation View



Product \ Measure	WP Assorted Option	WP Sales Reg+Promo U	WP Sell Thru %	WP Buy Quantity U	On Hand U	Total Units
Missy Cardigan Sweaters	☐	0	0.0 %	0	2,841	0
54291800 - Contrast Elbow	☐	0	0.0 %	0	803	0
63214451 - Waffle Knit	☐	0	0.0 %	0	0	0
65945004 - Waffle Knit	☐	0	0.0 %	0	0	0
70063172 - Merino Wool	☐	0	0.0 %	0	745	0
72939751 - Merino Wool	☐	0	0.0 %	0	737	0
73137693 - Merino Wool	☐	0	0.0 %	0	556	0
77316938 - Angled Front	☐	0	0.0 %	0	0	0
78498351 - Angled Front	☐	0	0.0 %	0	0	0

Measure Table

Table 9-30 Approve Plan View Measures

Label	Definition
Wp Mandatory	Working Plan Mandatory Flag
Wp Selling Start (Override)	Selling Start Date of an Item
Wp Selling End (Override)	Selling End Date of an Item
Status	Item Status – New/Carryover/Non Go Forward
ASO Assorted Option , Assorted Option Count, Sales Reg+Promo U, keep/add/drop	ASO Assorted item, option count, Regular and Promotional Sales Units, Item Status of Keep/Add/Drop
OP Assorted Option , Assorted Option Count, Sales Reg+Promo U	Original Plan Assorted item, option count, Regular and Promotional Sales Units
WP Accept ASO, Assorted Option, Assorted Option Count, Sales Reg+Promo U	Working Plan Boolean flag for accepting ASO Plans, Assorted Option, Assorted Option Count, Regular and Promotional Sales Units
Wp Buy Quantity U	Working Plan Buy Quantity Units
Sell Through %	Sell Through % inherited from the Plan Buy Quantity Step.
On Hand U	Units on hand
Total Units	Sum of Buy Quantity and On Hand Units

Measure Profile

Default Profile

The Default profile is used to Copy ASO recommendations into Working Plan Measures.

Buy Quantity Profile

The Buy Quantity Profile is used to plan Buy Quantity for the Final Space Optimized Assortment Plans.

Approve Plan View

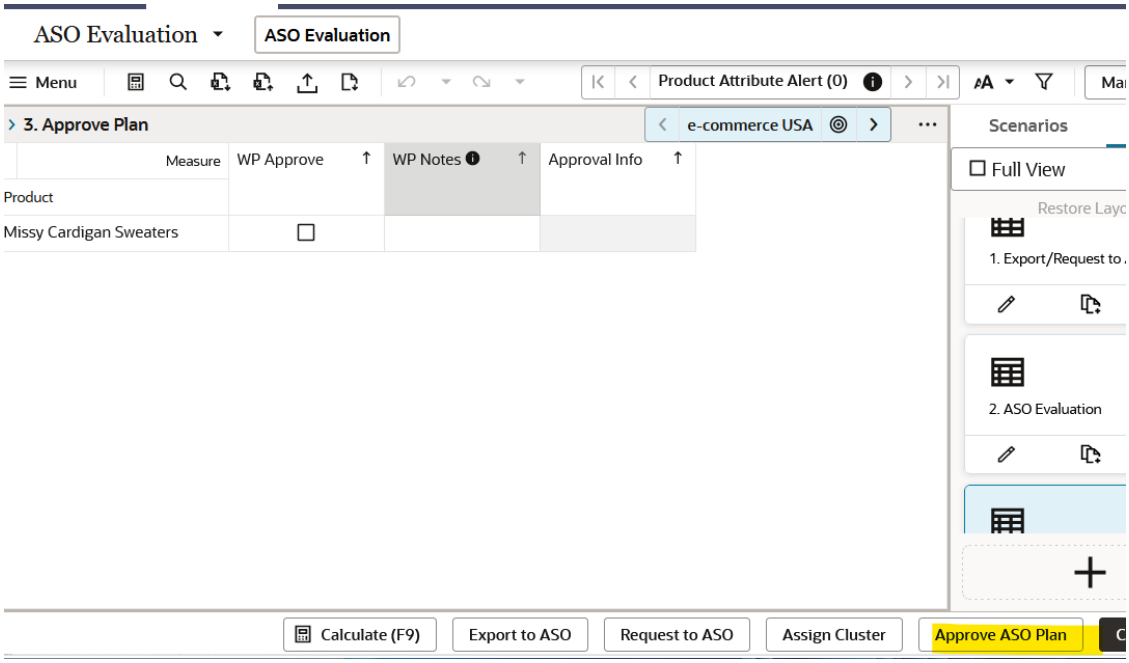
In this view, the Buyer or Planner selects the subcategories to be approved and enters any approval notes (optional) and then clicks **Approve ASO Plan** to copy the Working Plan version of the measures into the Current Plan version of each measure.

Approving here only updates the Current Plan (CP Version); the Original Plan will not change. In this scenario, OP and CP versions are not the same for key measures.

The steps to complete this process:

- In the Approve measure, select the WP Approve Boolean measure flag for the subcategory.
- In the Notes measure, enter approval comments.
- Optionally, in the Notes measure enter any approval comments.
- Run the Approve ASO Plan Application Action.

Figure 9-33 Approve Plan View



Measure Table

Table 9-31 Approve Plan View Measures

Label	Definition
Approve	Boolean flag measure required to be checked to approve the Final Assortment Plan.
Notes	Used to enter approval comments.
Approval Info	Provides information about the most recent plan approval.

Measure Profile

Default Profile

The Default profile is used to approve the Final Space Optimized Assortment plan

Application Action Approve ASO Plan

The Approve ASO Application action copies the ASO Recommended Assortment Plan metrics into the Working Plan measures and approves the final Space Optimized Assortment Plan for the selected subcategories to be sent to ASO and IP.

10

Item Planning - Basics

Before the beginning of an item's lifecycle, Item Planning takes place. You have the option of planning full price sales by item, as well as the weekly receipt plan to support sales. The Item Plan can use the approved Assortment Plan as the starting point for the plan which can either come from an external Assortment Planning tool or the Assortment Strategy described in the prior chapter.

Item-Planning Basics handles the life cycle of Basic/Continuous items. In this workflow, you have the capability of planning for basics across multiple seasons in one workspace rather than having to plan and replan the same set of items in different workspaces, one for each season. Every fashion retailer has a mix of both basic and seasonal items. Basics are long lifecycle items that include white t-shirts, denims, socks, and so on, and are active lines throughout the year. Seasonal items are short lifecycle items such as specific winter wear or summer wear, active only during a particular season. You will have to log in to a different workspace for each season for short life cycle items. But, for long life cycle/basic items, Item-Planning Basics provides a single workspace to work across seasons for the chosen product hierarchy. If a subclass has a mix of both basic and seasonal items, you can review the aggregated plans of both basic and seasonal style colors in the Item-Planning workbook and make the required edits to meet Targets.

Typical Business Users

The typical business user who completes this task will be an Assortment Planner and Item Planner. The Planner will usually have completed the Assortment Planning process, and is now ready to plan the execution of that assortment plan for basic/continuous items in the Item Planning - Basics process.

Data Requirements

- Approved location clusters
- Location hierarchy
- Product hierarchy
- Calendar hierarchy
- Sales Retail, Sales Unit, and Cost actuals
- Curve Library
- Item attributes and attribute values
- Item images loaded by the Administrator (optional)

Create the Item Planning Basics Segment

When working in a segment, it is a common practice to keep the wizard selections for the segment size limited to what will be worked on, to facilitate navigation and increase UI responsiveness.

To create the Item Planning Basics segment:

1. Click the **Assortment Services** task in the Tasks menu. Then, click the **Planning Services** activity and then the Item Planning Basics task.
2. The dialog to create the new plan opens. Click **Create New Plan**.
3. Enter a descriptive Plan Label in the text field. Click **Ok**.
4. In Select Product, select one or multiple subclasses and click **Next**. Items having the attribute product type as basics alone will be visible in the wizard as this workbook is exclusively for basics.
5. In Select Calendar, select the time period for this assortment. Weeks belonging to Multiple Assortment Periods may be brought into the segment. The time period between the first week and the last week serves is the lifecycle of the item.
6. In Select Cluster Version, select the cluster you want to plan the basics in. If the cluster selected for planning basics is the same as the cluster assigned to the assortment period for the parent department, plans from IP Basics will match the plans in IP Pre-season and In-season workbooks.

   If the cluster selected for planning basics is different than the cluster assigned to the assortment period of the parent department, plans created in IP Basics stored at the granular level of the store will get regrouped to the new cluster definitions of the IP Pre-season and In-season workbooks.

   > **Note:**
   >
   > Assortment Details can vary by subclass. If multiple subcategories are selected, the details shown will be based on the first order subclass. When final plans are being reviewed in the IP seasonal workbook, if the cluster versions selected IP Basics and IP Seasonal workbooks are different, the plans from the Basics workbook will reaggregate based on the cluster definitions of the seasonal workbook.

   Click **Finish**. The Item Planning Basics segment is built.

Item Planning Basics Process Steps

The high-level steps to complete this process:

- Review targets from Assortment Strategy and MFP.
- Plan Sales and Margin by item for basics.
- Create a receipt and inventory plan by item for basics.
- Reconcile to the targets.
- Approve the OP and CP version item plan for basics.
- You can review these plans and aggregate basics and seasonal lines against department-level targets in the Item Planning Pre-season workbook.

  If you override the approved plans for basics in the item-planning pre-season workbook, that will take priority over the approved basics plan. Whichever is the last committed and approved plan, will have precedence.

Step 1: Sales & Margin

The first step in the Item Planning Basics process is Sales & Margin. You can create a unit target from the CP of the Assortment Strategy, import it from an external Assortment Plan, or create a unit target using MFP, LY, or a user-entered number. The purpose of this step is to create unit targets for each item, to be used in the creation of the sales plan. This can be performed at the cluster level or higher. This step is also used to define parameters such as whether the item will be assorted in a particular cluster, start and end selling date overrides, and adjustments of full price sales.

The steps to complete this process:

- Set item parameters.
- Seed sales.

Tabs and Views in this Step:

- **Define Parameters Tab:**
  - Define Parameters View
  - Define Product Rollup View
  - Define Thresholds View
  - Review Curve Source View
  - Review Normalized Curve View
- **Sales and Margin Tab:**
  - Plan Sales & Margin View
  - Reconcile to MFP View

Application Actions

Seed Sales

The Seed Sales Application Action populates an item's weekly sales based on the Sales Source selected.

Refresh Product Rollup

The Refresh Product Rollup Application Action creates dynamically nested three groups of alternate hierarchies based on three user-defined attribute selections for each selection. After running the Application Action, you may select the alternate product hierarchy to see rollups based on the selections.

Define Parameters Tab

The Define Parameters tab is used to plan Target Sales U, override start and end sell dates, seed sales based on a selected data source.

Define Parameters View

The Define Parameters view is used to assign a curve and seed sales. If all items within a subclass and all clusters will receive the same data, you can rollup to subclass and All Location in the product and location hierarchies, respectively.

The steps to complete this process:

- Review the assorted items in the AP Tgt Assorted Item Boolean measure. Item Plans will be created for all assorted items. AP Tgt Assorted Item will be true if any weeks within this basic planning workbook contain weeks where the item is assorted in AP.
- AP Tgt Sales U is the sum of all sales planned and approved from assortment periods. You can use the variance measure to populate the Tgt Sales U which is used to create the weekly sales using the selected curve. For item Planning Basics, this can be manually planned based on the number of seasons an item is being carried in. If AP Tgt Sales U gives ***N*** number of units per assortment period. If you are planning to carry this item in three assortment periods, you can populate the Tgt Sales U as ***3*N***, thereby planning enough quantity required to last the life. You can also plan units by editing the Target ROS measure which recalculates the Target Sales U.
- Review the start and end selling weeks. The start and end selling week dates are based on the start and end week selected in the calendar wizard.
- Optionally, override the start and end selling week dates. If the override start date is outside the workbook weeks, it will default the start week to the first week of the workbook. Similarly, if the override end date is outside the workbook weeks, it defaults to the end of workbook period.
- In the WP Seed Sales measure, select the Boolean.
- In the WP Seed Sales Source measure, select a data source to seed sales from:
  - Target Using Selected Curve: Sales TGT is defined in the Target Review step.

    If this is the source selected, the WP Curve Source must also be defined.
  - Last Year: last year.
  - Like Item LY: like item last year.
  - Forecast: forecast.
  - IP CP: Item Plan Current Plan.
  - Like Item CP: Like Item Current Plan.

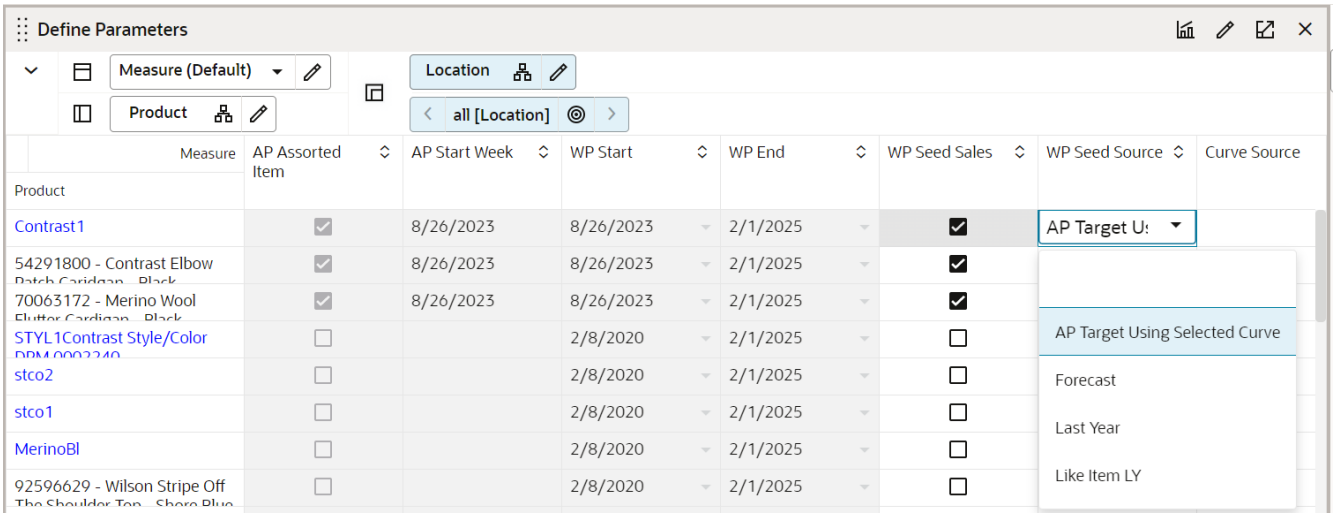
    If this is the source selected, then WP Like Item and WP Like Item % must also be defined.
- In the WP Curve Source measure, select the curve from which to seed sales.

  Curves were set in the Assortment Maintenance segment and can be referenced in the Review Curve Library view.
- If you want to assign a like item, in the WP Like Item measure, select the existing item to assign to the new item.

  In the Like Item % measure, assign an adjustment ratio for the existing item sales to be copied to the new item.
- A real time alert has been provided to alert the user if the target is selected, but the curve source and type are not set.

Additionally there is a real time alert if you select Seed Sales source of Like Item, but WP Like Item is not set.

Figure 10-1 Define Parameters View



Measure Table

Table 10-1 Define Parameters View Measures

Label	Definition
AP Assorted Item	A Boolean flag measure that indicates when an item is carried in the Approved Assortment plan. The AP Assorted Item is True if any weeks within this Basic Planning workbook contain weeks where the item is assorted in AP.
AP Assorted Item Count	An integer measure used to indicate the total number of items carried.
Tgt Sales U	The Target Sales U planned by you. AP Tgt Sales U is the sum of all sales planned and approved cycle of the item.
Tgt ROS	The Target Rate Of Sale Planned by you. You can edit the Target ROS to change the Target Sales U.
AP Start Week	Read-only week based on the start week of the assortment period where the item is first assorted.
Tgt Sales U Var AP Tgt %	Variant measure that can be used to set Tgt Sales U in comparison with AG Tgt Sales U.
Start Week	The beginning of the item life cycle per the calendar wizard selection. If AP Start Week is populated, then it equals the AP Start Week. If not, it will default to the first week of the workbook built unless Selling Start Override is entered.
End Week	The ending of the item life cycle per the calendar wizard selection. It will default to the last week of the workbook built unless Selling End Override is entered.
Wp Selling Start(Override)	Overridden value of the beginning of item lifecycle.
Wp Selling End(Override)	Overridden value of end of item lifecycle.

Table 10-1 (Cont.) Define Parameters View Measures

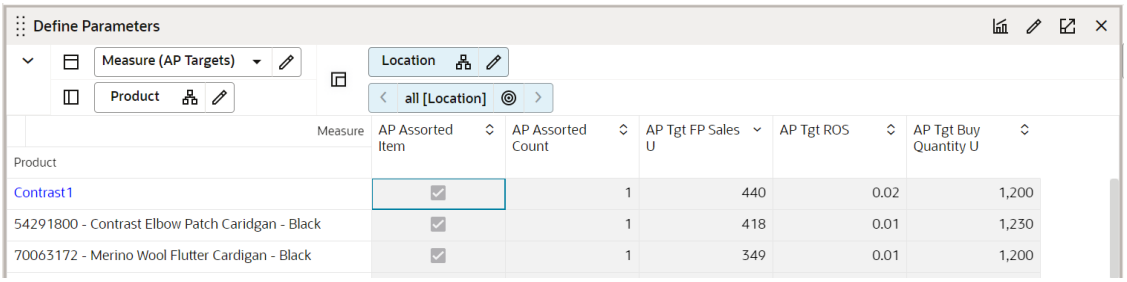
Label	Definition
WP Seed Sales	A Boolean flag measure which is required to be checked to create a weekly sales plan for assorted items.
WP Seed Sales Source	A drop-down list used to select the flow source for an item's sales.
WP Curve Source	A drop-down list used to select the curve source for an item's sales.
WP Like Item	An item used to populate the Sales R, U, and GM R of a new item being added to the assortment using an adjustment ratio.
WP Like Item %	Provides a facility to adjust a new item's Sales R, U, and GM R by using a percentage ratio to the sales of the like item.

Measure Profile

Default Profile

The Default profile is used to assign item parameters before planning sales.

Figure 10-2 AP Targets Profile



Define Product Rollup View

The Define Product Rollup view is used to select product attributes to view in an alternate hierarchy. This is available in the tab to display the item level. Nested product attribute rollup has been provided with three levels. You can set up to three different combinations for nested rollup with a maximum of three levels in each combination.

For example: as a first combination, you select Brand as a Level 1, Color as Level 2, and Fabric as Level 3 by clicking the list of attributes available in that category. This allows you to rollup your items by brand, then color inside each brand, and then by fabric inside each color.

This feature allows you to analyze and review the proposed assortment based on important attributes. You may select up to three attributes at a time for the dynamic rollup.

The steps to complete this process:

- Select up to three dynamic product attributes from the drop-down list.
- Run the Refresh Product Rollup Application Action.
- To view the product attribute:
  - In a view that displays the item level, click the Product Hierarchy tile.

- Select the attribute (Attribute 1 or 2 or 3) that you would like to view in the nested dynamic rollup.
- Click **OK**.

Figure 10-3 Define Product Rollup View

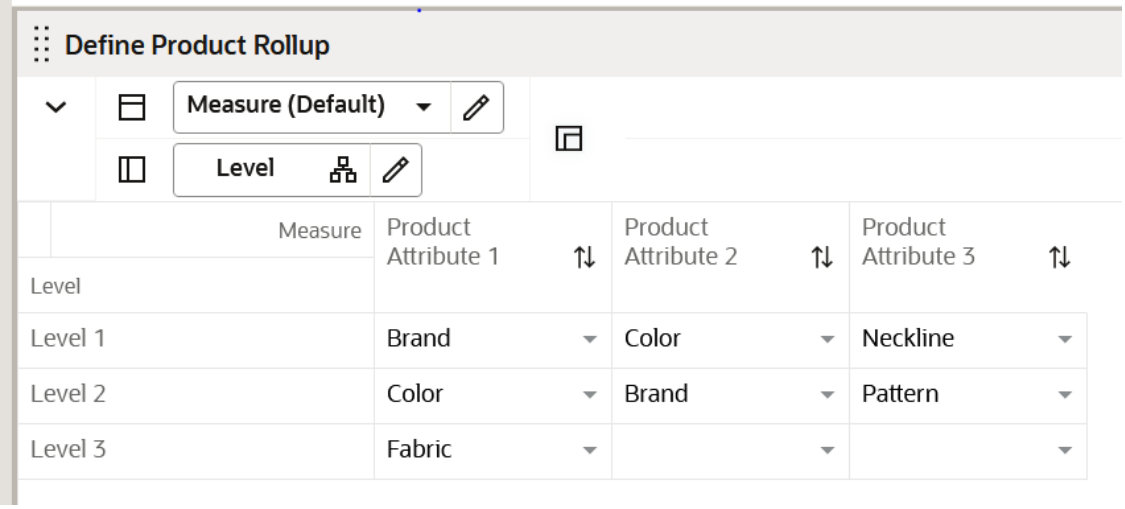
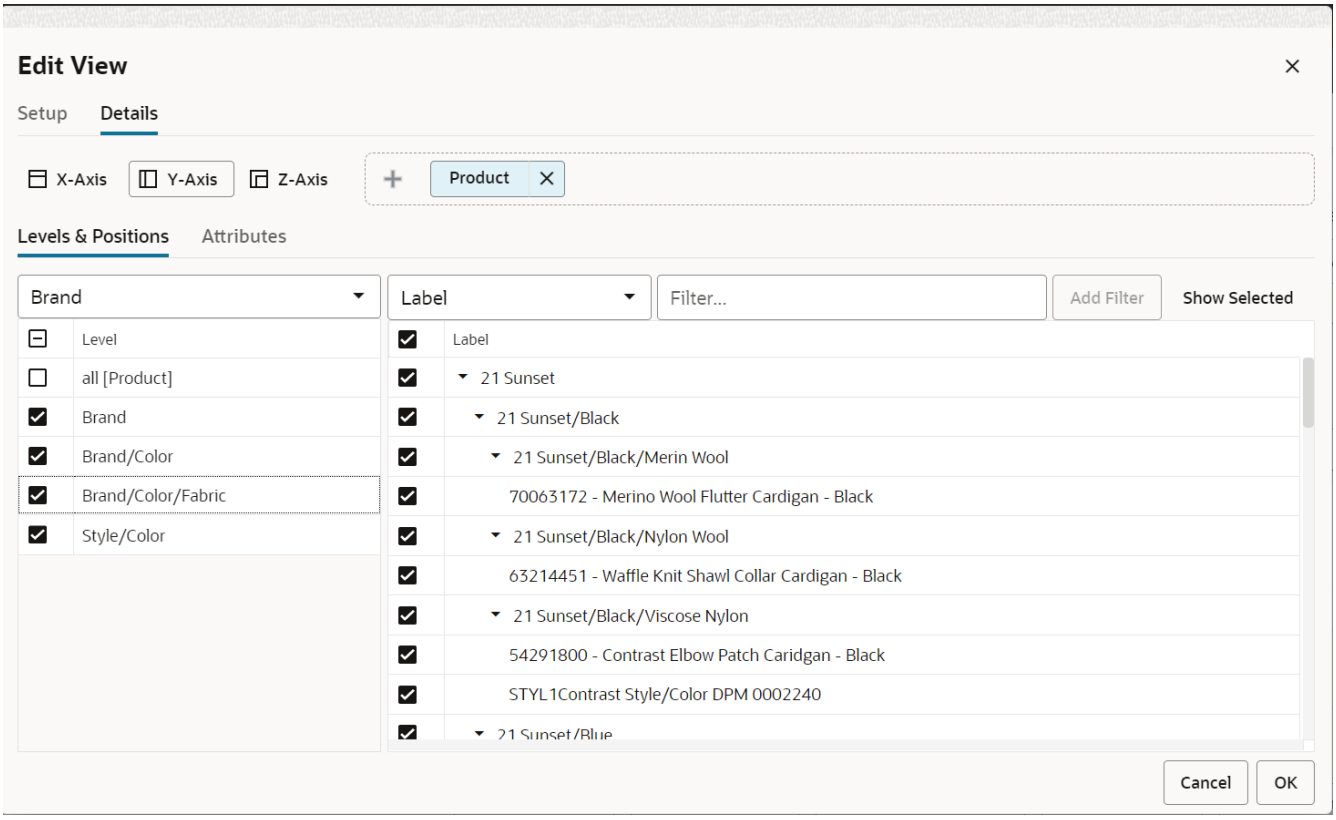


Figure 10-4 Edit View



Measure Table

Table 10-2 Define Product Rollup View Measure

Label	Definition
Product Attribute 1, 2, 3	Drop-down list to present product attributes for a dynamic product hierarchy rollup.

Measure Profile

Default Profile

The Default profile is used to select dynamic product attributes. You can view up to three levels to review and work on Plans rolled up to multiple attributes. Using the nested dynamic product rollup feature, you can group plans for three different attributes. If you are working on a class, Level 1 is brand, Level 2 is color, and Level 3 is fabric, you can review and analyze plans for all brands of a class, then across all colors inside each brand, and then across every fabric for each color.

Application Action

Refresh Product Rollup

The Refresh Product Rollup Application Action creates dynamically updated alternate hierarchies based on user-defined attribute selections. After running the Application Action, you may select the alternate product hierarchy to see rollups based on the attribute selections.

Integration with Assortment Planning

The Basic Sales Reg+Promo U is available in the Recommend Assortment and Plan Buy Quantity worksheets as a read-only measure to show the approved CP Sales Reg and Promo units from the Item Planning - Basics template. This allows you to see basic planned sales in case these basic items already have sales planned farther out in the future, so it serves as a reference for you to select the basic items with the sales plan and use for planning the buy quantity.

Integration with Item Planning

The WP and approved version of data from the Item Planning - Basics workbook should reflect in the pre-season and in-season templates. It will load/refresh the corresponding week's Sales plan from the Basics workbook to the Item Planning templates. It also works vice versa if you plan in the Item Planning templates for the basic items and commit/approve should reflect the change in the Basics workbook.

If the basic items are planned farther out in the planning horizon than the assortment periods, there will be a real-time alert in pre-season and in-season workbooks to notify you that you should assort/add the basic item with the approved plan. In the pre-season workbook, this real-time alert will be reflected in the WP Assorted Item flag. In the in-season workbook, this real-time alert is reflected in Keep/Add/Drop. This will allow you to make sure they include the basic items already planned in the planning horizon using the new basic planning template.

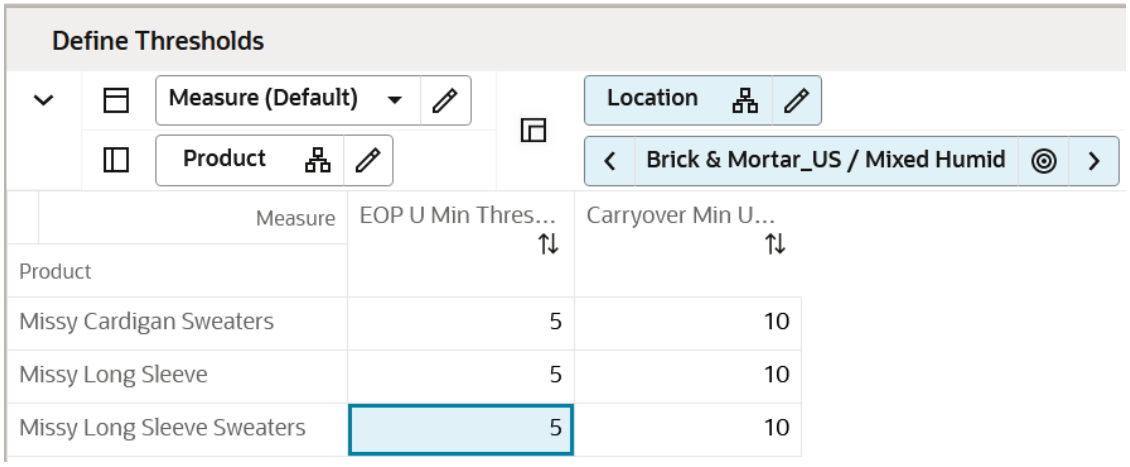
Define Thresholds View

This view focuses on removing special, one-off buys to optimize the history used for target option calculations. You can create the parameters around historical data used to calculate the Target Number of options.

The step to complete this process:

- Define thresholds for minimum Sales Units, Receipts Units, and Carryover Units.

Figure 10-5 Define Thresholds View



Measure Table

Table 10-3 Define Thresholds View Measures

Label	Definition
EOP U Min Threshold	Minimum EOP Units threshold to consider the options into the Rate of Sales Calculation that is defined at subclass or higher levels.
Carryover Min Units Threshold	Minimum on hand Units threshold to consider the options as Carryover status.

Measure Profile

Default Profile

This profile is used to access the view which focuses on defining the thresholds.

Review Curve Source View

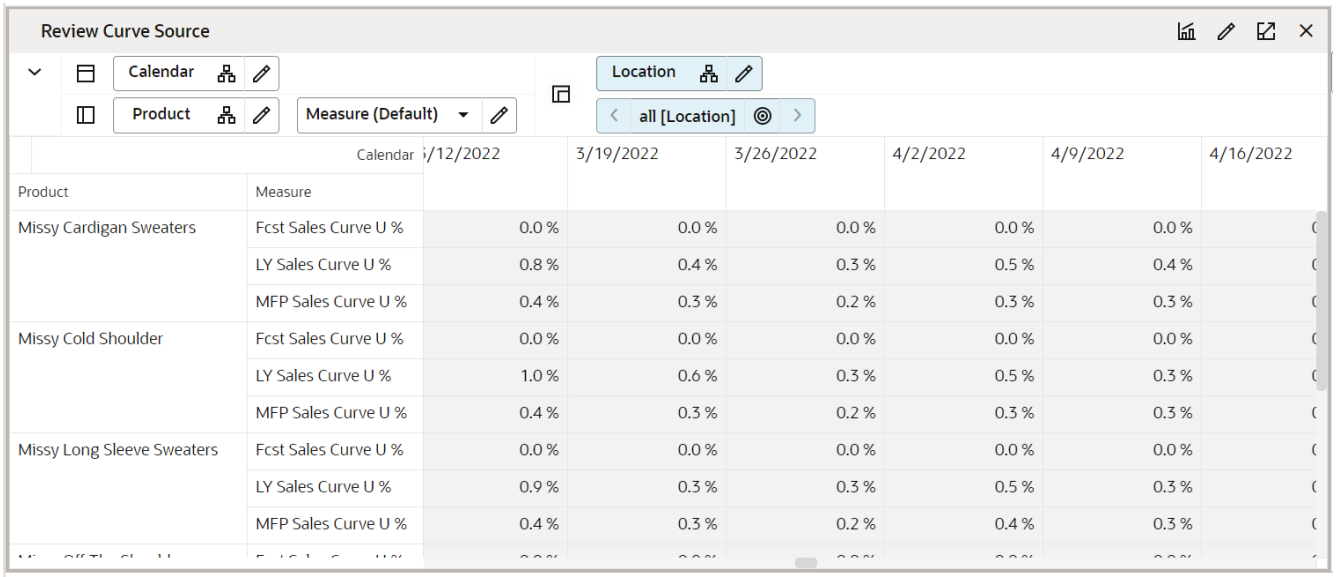
The Review Curve Source view shows the normalized Forecast, Last Year, and MFP Sales Curve % for the calendar duration of the workbook at the subclass/cluster intersection. The seed sales custom menu is executed with the curve source selecting either the absolute or relative curve. If you select Absolute as the curve type, Absolute will take the curve source's respective selling weeks of the item and normalize it. If you select the curve type Relative, it will take the curve of the entire workbook duration and shrink it to fit the item's selling periods.

The Review Curve Source view is a reference-only view used to review curves that were set up in Curve Maintenance. The curves can be applied to the sales, to intelligently spread sales over time, which is later used for planning receipt flows. For more information about the different types of curves and their functionality, see Curve Maintenance.

The step to complete this process:

- Review the sales percent to totals for each curve, as necessary.

Figure 10-6 Review Curve Library View



Measure Table

Table 10-4 Review Curve Source View Measure

Label	Definition
Fcst Sales Curve U %	Used to display the weekly sales percent to total of Forecast Sales curve.
Ly Sales Curve U %	Used to display the weekly sales percent to total of Last year Sales curve.
MFP Sales Curve U%	Used to display the weekly sales percent to total of MFP Sales curve.

Measure Profile

Default Profile

The Default profile is used to view each curve.

Review Normalized Curve View

The Review Normalized Curve view is a read-only curve showing the applied sales percent to the total of the selected curve at the style-color level. This view allows you to analyze weekly sales percentages at the item level for a chosen cluster.

Measure Table

Table 10-5 Review Normalized Curve View Measure

Label	Definition
Wp Normalized Curve U %	Used to display the weekly sales percent to total of the applied sales curve.

Measure Profile

Default Profile

The Default profile is used to view the curve for each style-color.

Sales and Margin Tab

The Sales and Margin tab is used to plan Regular and Promotional Sales by item and cluster.

Plan Sales & Margin View

The Plan Sales and Margin view is used to plan Regular and Promotional Sales by item, week, and location cluster.

Running the Seed Sales Application Action creates the following logic for each Assorted Basic Item:

- Source Sales Units are spread to week based on the source selected.
- Units are multiplied by the Base Unit Price and Base Unit Cost to get Retail and Cost.

  Base Unit Price and Cost are interfaced from a source system for existing items and entered by you for placeholder items in the Item Administration segment.

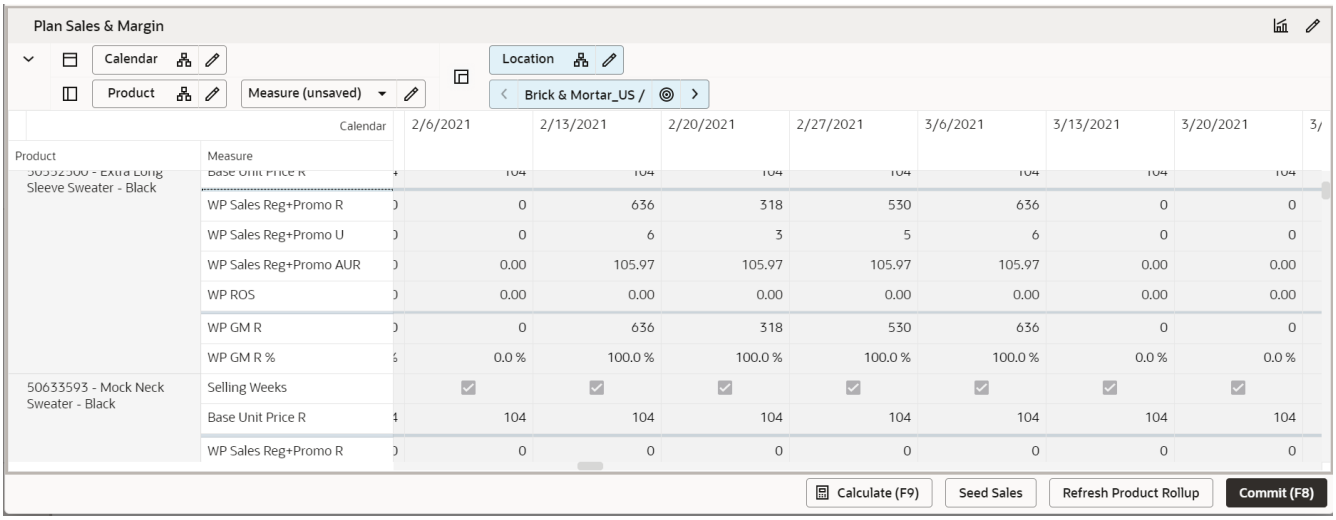
The steps to complete this process:

- Review and adjust each item/week/cluster Regular Sales:
  - It is a best practice to seed sales before planning the sales buckets so that there is a demand curve in Reg Sales from which to begin your plan.
  - If there is no seeding and no prior data entered, then planning WP Sales will spread proportionally (since there is no demand curve the data will spread evenly) to Reg Sales.

    If that is not the desired behavior, plan Reg Sales before planning Sales, so that a demand curve is in place before planning WP Sales.
- Review and adjust Sales after having planned Regular Sales, if necessary.

  User-Defined Exceptions are a helpful way to identify exceptions that need to be manually adjusted. For detailed information on these capabilities, see the *Oracle Retail Predictive Application Server Cloud Edition User Guide*.
- Review AUC and GM measures to ensure the financial viability of the plan.

Figure 10-7 Plan Sales & Margin View



Measure Interactions

The following logic is used when planning different types of sales:

- WP Sales are the aggregation of WP Sales Reg and WP Sales Promo.
- Updates to WP Sales will update WP Reg Sales and WP Promo proportionally.
- Updates to WP Sales Reg R will hold AUR and recalculate Units.

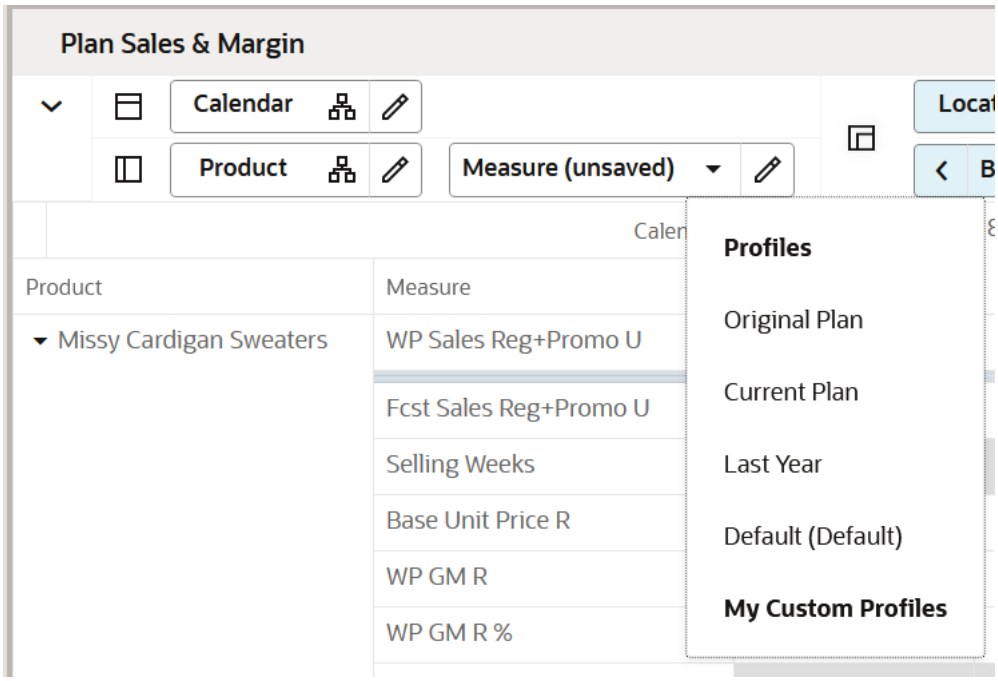
Measure Table

Table 10-6 Plan Sales & Margin View Measures

Label	Definition
Selling Weeks	A Boolean flag measure used to indicate the week the item begins selling in the assortment.
WP Sales Reg R, U, AUR	Regular Sales Retail, Units, and Average Unit Retail.
WP ROS	Working Plan Rate of Sales.
WP Sales GM R, GM R %	Sales Gross Margin value and Gross Margin percent for an item.
Fcst Sales U	Forecasted Sales Units from IPOCS-Demand Forecasting.
Base Unit Price R	An item's retail value and can be different by location.
WP Sales R, U, C, AUR, AUC	Working Plan Sales Retail, Units, Cost, Average Unit Retail, and Average Unit Cost.

Measure Profiles

Figure 10-8 Plan Sales & Margin View: Measure Profiles



Default Profile

The Default profile is used to Regular and Promotional sales by item and cluster.

Measure Table

Table 10-7 Plan Sales & Margin View with Returns/Net Sales Measures

Label	Definition
Fcst Sales U	Forecasted Sales Units from IPOCS-Demand Forecasting.
Customer Returns R, R %, U, U%, AUR, C, AUC	Customer Returns Retail, Retail percent of WP Sales R, Units, Units percent of WP Sales U, Average Unit Retail, Cost and Average Unit Cost
Net Sales R, U, AUR, C, AUC, GM R, GM %	Net Sales = Sales - Customer Returns Net Sales Retail, Units, Average Unit Retail, Cost, Average Unit Cost, Gross Margin value and Gross Margin percent.
WP Sales C, AUC	Working Plan Sales Cost and Average Unit Cost for an item.

Last Year Profile

The Last Year profile is used to review last year Regular and Promotional data compared to the working plan.

Original Plan Profile

The Original Plan profile is used to review the most recently approved Item Plan Original Plan (OP) Regular and Promotional data compared to the working plan.

Current Plan Profile

The Current Plan profile is used to review the most recently approved Item Plan Current Plan (CP) Regular and Promotional data compared to the working plan.

Reconcile to MFP View

The Reconcile to MFP view in Item planning Basics is used to compare the working plan of the item plan to the approved MFP Current Plan (MFP Tgt) for each subclass and cluster.

The steps to complete this process:

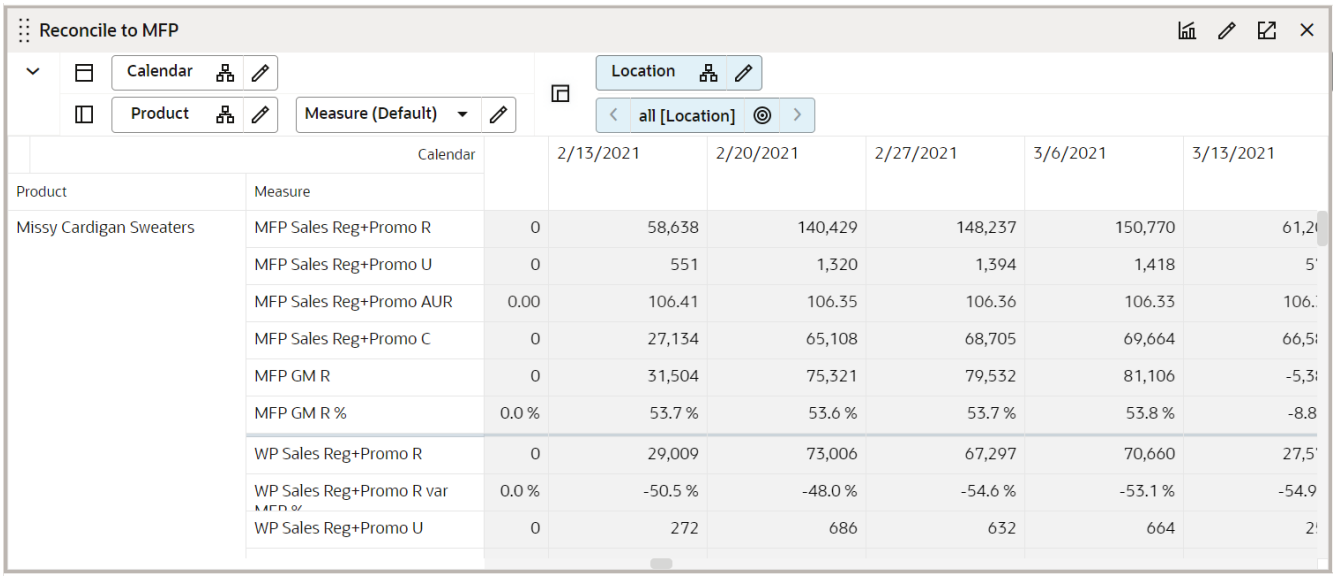
- Review WP Sales var MFP Tgt % measures to identify variances that are outside of acceptable parameters.

  Review Sales R, Sales U, Sales C, and GM variances to ensure that all of the financials meet targets or are within the targets.
- Make adjustments to the sales and the receipt plans to be within an acceptable variance.
- If a subclass has a mix of both Basic and Seasonal lines, Basics are planned here. MFP Targets serve as a reminder of the Target. Final Reconciliation happens in the Item Planning Pre-season workbook after aggregating item plans for both Basics and Seasonal lines

Repeat this process for each subclass and cluster in the assortment.

Note that if a Location Plan is not available, the MFP CP view displays the MFP Current Plan by subclass spread to Location using last year's location sales' proportionality. If a Location Plan is available, the MFP CP view displays the MFP Current Plan by subclass spread to Location using the Location Plan CP sales' proportionality.

Figure 10-9 Reconcile to MFP View



Product	Measure	Calendar	2/13/2021	2/20/2021	2/27/2021	3/6/2021	3/13/2021
Missy Cardigan Sweaters	MFP Sales Reg+Promo R	0	58,638	140,429	148,237	150,770	61,2
	MFP Sales Reg+Promo U	0	551	1,320	1,394	1,418	5
	MFP Sales Reg+Promo AUR	0.00	106.41	106.35	106.36	106.33	106.
	MFP Sales Reg+Promo C	0	27,134	65,108	68,705	69,664	66,5
	MFP GM R	0	31,504	75,321	79,532	81,106	-5,3
	MFP GM R %	0.0 %	53.7 %	53.6 %	53.7 %	53.8 %	-8.8
	WP Sales Reg+Promo R	0	29,009	73,006	67,297	70,660	27,5
	WP Sales Reg+Promo R var MFP %	0.0 %	-50.5 %	-48.0 %	-54.6 %	-53.1 %	-54.9
	WP Sales Reg+Promo U	0	272	686	632	664	2

Measure Table

Table 10-8 Reconcile to MFP View Measures

Label	Definition
MFP Sales R, U, AUR, C, AUC, GM R, GMR%	MFP Sales Retail, Units, Average Unit Retail, Cost, Average Unit Cost, Gross Margin value, Gross Margin percent.
WP Sales R, U, AUR, C,AUC, GM R, GM R%	IP Working Plan Retail, Units, Average Unit Retail, Cost, Average Unit Cost, Gross Margin value, Gross Margin percent.
WP Sales Reg+Promo R, U, AUR	IP Working Plan Full Price Retail, Units, Average Unit Retail.

Step 2: Receipts & Inventory

The third step in the Item Planning Basic process is Receipts & Inventory for basic lines. This step is used to define parameters such as BOS inventory, initial buys, lead time, presentation minimums, and safety stock, among other parameters.

The steps to complete this process:

- Set inventory parameters.
- Seed receipts.
- Adjust receipts and inventory based on the sales plan.

Tabs and Views in this Step:

- **Receipts & Inventory Tab:**
  - Define Parameters View
  - Plan Receipts & Inventory View

Application Actions

Flow Receipts

The Flow Receipts Application Action populates a weekly receipt plan based on the parameters Order Frequency, Pres Mins, and Safety Stock Weeks.

Round Receipts

The Round Receipts Application Action uses the inputs of WP Pack Size U and WP Min Order Quantity to round receipts up to match these parameters.

Receipts & Inventory Tab

The Receipts & Inventory tab is used to set inventory parameters to flow receipts and to adjust weekly sales and receipts to create an inventory plan for reconciliation and approval.

Define Parameters View

The Define Parameters view is used to assign inventory and receipt parameters to flow receipts. Based on the parameters, the system will calculate the optimal receipt flow to support the sales plan.

The steps to complete this process:

- In the WP Flow Receipts measure, select the Boolean.
- If an item is a carryover item, it will inherit its projected EOP for the Start Sell week and populate the BOP.
- For the new item, plan the BOP for the first week Item Lifecycle, visible in the Receipts and Inventory tab.
- Entering a BOS would not be necessary in this scenario.

  Planning the BOS will populate the first week BOP of the Assortment Period, visible in the Receipts and Inventory tab.

  Plan two out of the three measures to calculate the third value.
- In the WP Initial Buy U, C, and AUC measures, enter the initial buy quantities for each item.

  Plan two out of the three measures to calculate the third value.
- In the WP Initial Receipt Lead Time measure, enter the number of weeks before the Start Sell week that receipts should be received.
- In the WP Lead Time (Days) measure, enter the number of days it takes for the product to arrive from your vendor/supplier to the warehouse or store.

  This measure is used to generate the Immediate Need real time alert in the In-season Planning segment, letting you know that your EOP is less than your Safety Stock.
- In the WP Order Frequency (Weeks) measure, enter how often receipts will arrive.

  For example, entering *1* means that receipts arrive every week, and *2* means that receipts arrive every other week.
- In the WP Presentation Min U measure, enter the minimum amount of inventory on the sales floor per store.

  This is used only in calculating the initial buy and can be thought of as a fixture fill.
- In the Safety Stock (Weeks) measure, enter the number of weeks of sales that the safety stock should cover.

  Use this measure to use future weeks of sales to generate a dynamic safety stock recommendation.

  It is recommended to use Safety Stock U or Safety Stock (Weeks)to generate a recommended initial buy.
- Click **Calculate**.
- Review the WP Initial Buy U var Recommended % to compare your set initial buy to the system calculated initial buy that is based on the entered parameters.

  The WP Recommended Initial Buy is based on BOS, Order Frequency, Presentation Minimums, Safety Stock Weeks, and the Sales plan.
- Make adjustments to the initial buy quantities to ensure that items are not over or under-inventoried.
- In the Tgt WOS measure, enter a target Weeks of Supply.

  This is used in the In-season segment to compare the Tgt WOS with the WP WOS.
- In the WP Pack Size U measure, enter how many items come in a pack.

  This measure is used in conjunction with the Round Receipt Application Action to round receipts up to the pack size entered.

For example, if your pack size is 10 and your receipts are 88, it will round up to 90 to meet the pack size.

- In the WP Min Order Quantity measure, enter a minimum order quantity.

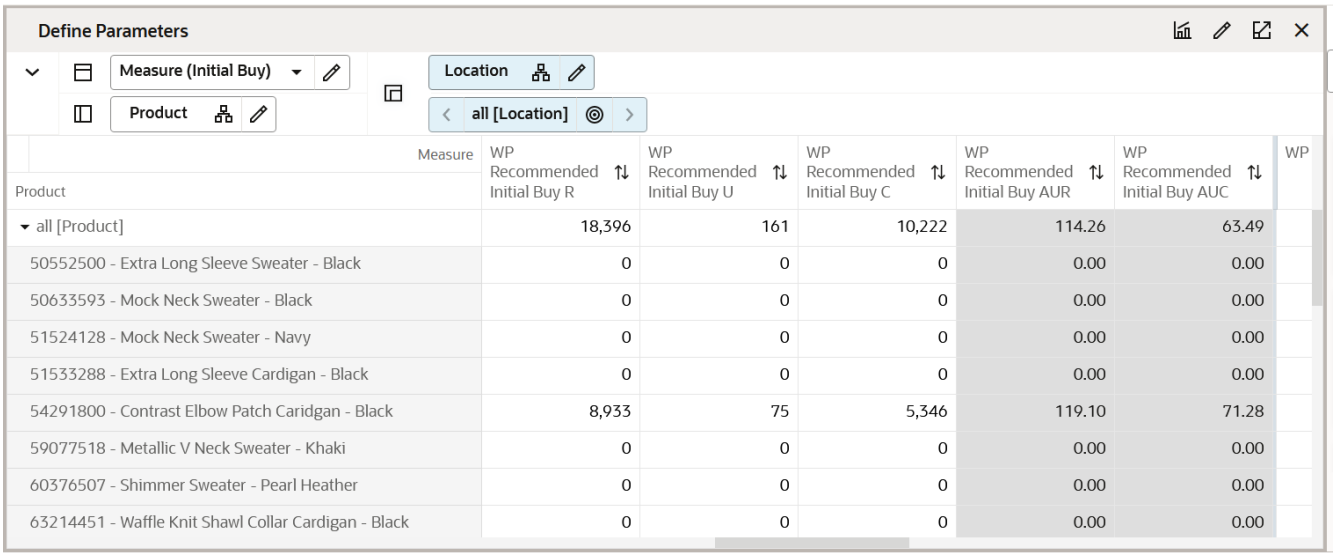
  This measure is used in conjunction with the Round Receipt Application Action to round receipts up to the minimum order quantity entered.

  For example, if your minimum order quantity is 100 and your receipts are 88, it will round up to 100.

- Run the Flow Receipts Application Action to create a weekly receipt flow based on the parameters and the Sales plan.
- Run the Round Receipts Application Action to round receipts using the Pack Size and/or Min Order Quantity measure inputs.

  Review your WP EOP, WP WOS and WP Sell Thru % after running the Round Receipts Application Action to ensure that you are not over-inventoried due to rounding up.

Figure 10-10 Define Parameters View



Product	WP Recommended Initial Buy R	WP Recommended Initial Buy U	WP Recommended Initial Buy C	WP Recommended Initial Buy AUR	WP Recommended Initial Buy AUC	WP
all [Product]	18,396	161	10,222	114.26	63.49	
50552500 - Extra Long Sleeve Sweater - Black	0	0	0	0.00	0.00	
50633593 - Mock Neck Sweater - Black	0	0	0	0.00	0.00	
51524128 - Mock Neck Sweater - Navy	0	0	0	0.00	0.00	
51533288 - Extra Long Sleeve Cardigan - Black	0	0	0	0.00	0.00	
54291800 - Contrast Elbow Patch Caridgan - Black	8,933	75	5,346	119.10	71.28	
59077518 - Metallic V Neck Sweater - Khaki	0	0	0	0.00	0.00	
60376507 - Shimmer Sweater - Pearl Heather	0	0	0	0.00	0.00	
63214451 - Waffle Knit Shawl Collar Cardigan - Black	0	0	0	0.00	0.00	

Measure Table

Table 10-9 Define Parameters View Measures

Label	Definition
WP Flow Receipts	A Boolean flag measure that is required to be checked to calculate receipt quantity and flow based on set parameters and the sales plan.
WP Initial Buy U, C, AUC	The planned initial buy Units, Cost, and Average Unit Retail.
WP Initial Buy U var Recommended %	The variance between the planner input Initial Buy and the system-recommended Initial Buy.
WP Recommended Initial Buy U, AUC	The system calculated recommended initial buy Units and Average Unit Cost based on Order Frequency, Presentation Minimums, Safety Stock Weeks, and the Sales plan.

Table 10-9 (Cont.) Define Parameters View Measures

Label	Definition
WP Initial Receipt Lead Time	The number of weeks before the start sell week that the receipts should arrive. You can select the number of weeks from a drop-down list, with the maximum value being set in the Assortment Period Maintenance segment.
WP Lead Time (Days)	The number of days it takes for the product to arrive from your vendor/supplier to the warehouse or store. This measure is used to generate the Immediate Need real time alert in the In-season Planning segment, letting you know that your EOP is less than your Safety Stock.
WP Order Frequency (Weeks)	How often, in weeks, receipts arrive.
WP Presentation Min U	The minimum amount of inventory on the sales floor per store. This is used only in calculating the initial buy and can be thought of as a fixture fill.
WP Safety Stock (Weeks)	The number of future weeks of sales that additional units should be maintained to mitigate the risk of stockouts, based on future sales weeks. It is used for the initial buy as well as for subsequent receipt drops.
Tgt WOS	The planner entered targeted WOS by item/cluster, used in the Overage Real Time Alert.
WP Pack Size U	The number of units that come in a pack, used to round up receipts.
WP Min Order Quantity	The minimum order quantity, used to round up receipts.

Measure Profile

Default Profile

The Default profile is used to assign receipt parameters before flowing receipts.

Application Actions

Flow Receipts

The Flow Receipts Application Action populates a weekly receipt plan based on the parameters Order Frequency, Pres Mins, and Safety Stock Weeks.

Round Receipts

The Round Receipts Application Action uses the inputs of WP Pack Size U and WP Min Order Quantity to round receipts up to match these parameters.

Plan Receipts & Inventory View

The Plan Receipts & Inventory view is used by you to adjust net sales if necessary and adjust the receipt plan to meet sales needs based on business knowledge or constraints.

The steps to complete this process:

- Review the WP Net Sales U and make adjustments if necessary.
- Review the WP Receipts U and make adjustments to quantities or delivery weeks based on business knowledge.
- Review the WP EOP U to ensure there are no over or under-stock issues.

If the receipt plan does not support the sales plan, a Real Time Alert will be activated to alert action is needed.

Adjust the sales or the receipt plan to resolve the Real Time Alert.

- Review the WP WOS to view the calculated Weeks of Supply based on the sales and receipt plan.

  The WP WOS metric represents the number of future calendar positions that the current stock will cover. For example, If your calendar is aggregated to month, then WP WOS represents the future number of months that the stock will cover, if the calendar is aggregated to quarter, then it represents the number of quarters that the stock will cover.

  The WP WOS Weeks metric represents the inventory available to cover the future weeks at the week level irrespective of the calendar level selected.

  For each week, WOS is calculated as the number of future weeks of sales covered by the current period's EOP U.

- Review the WP Sell Thru % as a reference value to see how fast inventory is projected to sell through.

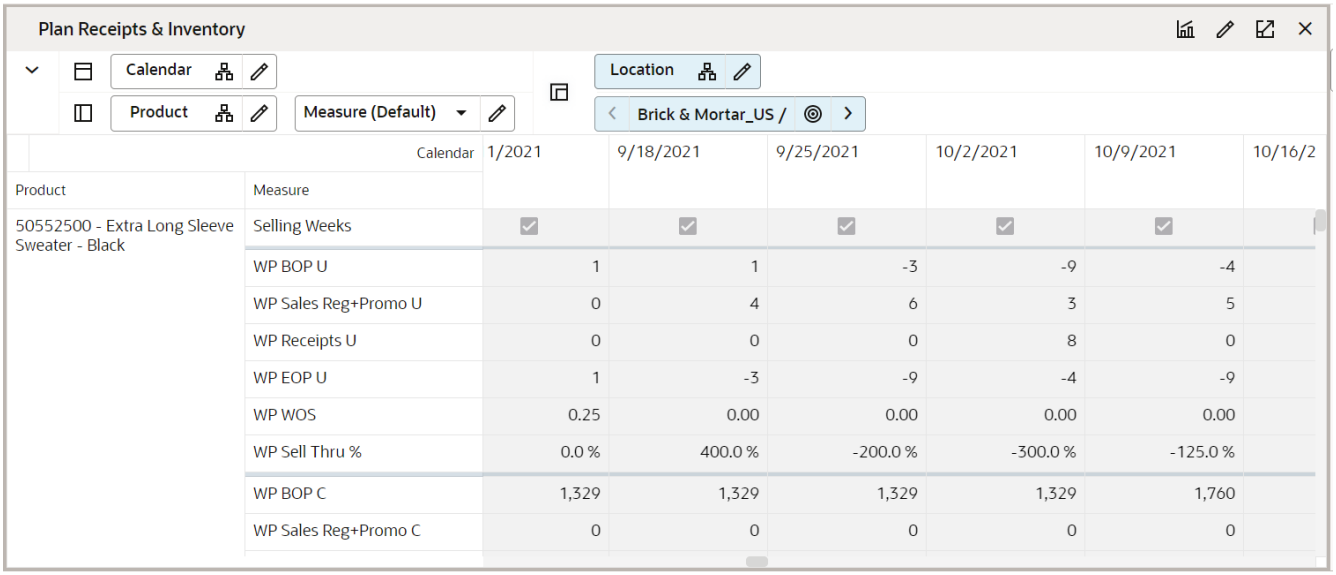
  For each week, Sell Thru % is calculated as Net Sales Units / (BOP U + Receipts U).

- Review the Cost measures.

Repeat this process for each item and cluster in the assortment.

Note that you can use Product Attributes to rollup your items by attributes. For example, this can be used to view inventory levels by attributes that are important to the category, to make sure that receipts are invested for important attributes.

Figure 10-11 Plan Receipts & Inventory View



Product	Measure	Calendar 1/2021	9/18/2021	9/25/2021	10/2/2021	10/9/2021	10/16/2
50552500 - Extra Long Sleeve Sweater - Black	Selling Weeks	✓	✓	✓	✓	✓	
	WP BOP U	1	1	-3	-9	-4	
	WP Sales Reg+Promo U	0	4	6	3	5	
	WP Receipts U	0	0	0	8	0	
	WP EOP U	1	-3	-9	-4	-9	
	WP WOS	0.25	0.00	0.00	0.00	0.00	
	WP Sell Thru %	0.0 %	400.0 %	-200.0 %	-300.0 %	-125.0 %	
	WP BOP C	1,329	1,329	1,329	1,329	1,760	
	WP Sales Reg+Promo C	0	0	0	0	0	

Measure Table

Table 10-10 Plan Receipts & Inventory View Measures

Label	Definition
Selling Weeks	A Boolean flag measure used to indicate the week the item begins selling in the assortment.
WP BOP U, C, AUC	The calculated Beginning of Period Units, Cost, and Average Unit Cost.
Net Sales U, C, AUC	Net Sales Units, Cost, and Average Unit Cost.
Receipts U, C, AUC	Receipts Units, Cost, and Average Unit Cost.
EOP C, AUC	The calculated End of Period Cost and Average Unit.
WP WOS	The number of future weeks of sales that will be covered by the current week's EOP U for the calendar level selected.
WP WOS Weeks	The number of future weeks of sales that will be covered by the current week's EOP U at the week level
Sell Thru %	The percent of inventory that will be sold during a period, calculated as Net Sales Units / (BOP U + Receipts U).

Real Time Alerts

Inventory Stock Thresholds

Alerts you that EOP Units are negative. Adjust the sales or the receipt plan to resolve the alert. The alert is activated when EOP falls lower than the Pres Min, and Safety Stock Weeks measures.

Measure Profiles

Default Profile

The Default profile is used to plan weekly receipts to cover the sales plan based on EOP inventory objectives.

Last Year Profile

The Last Year profile is used to compare the WP weekly receipts and inventory levels to last year values.

Initial Buy Profile

The Initial Buy profile is used to plan initial buy quantities for the first drop.

Original Plan Profile

The Original Plan profile is used to compare the WP weekly receipts and inventory levels to an approved Original Plan.

Step 3: Approve Plan

The final step in the Item Planning process is the Approve Plan. This step approves the item plans that you have created, analyzed, and reviewed for accuracy.

The output of this step is an approved Item Plan Original Plan and Current Plan.

The step to complete this process:

- Approve the item plan.

Figure 10-12 Approve Plan Step

Before Starting this Step:

- Thoroughly analyze and review the item plans by cluster to ensure they meet the financial goals of the category.

After Completing this Step:

- Begin Item Planning pre-season for seasonal items.

Tab and View in this Step:

- **Approve Plan Tab**:
  - Approve Plan View

Application Action

Approve Plan

The Approve Plan Application Action copies data from the Working Plan (WP) to the Original Plan (OP) and the Current Plan (CP).

Approve Plan Tab

This tab is used to approve the plan.

Approve Plan View

The steps to complete this process:

- In the WP Approve to OP/CP measure, select the Boolean flag for the subcategories and clusters that should be approved.

  If all subcategories and clusters should be approved at once, rollup to All Product and All Location and select the Approve to OP measure at that level.

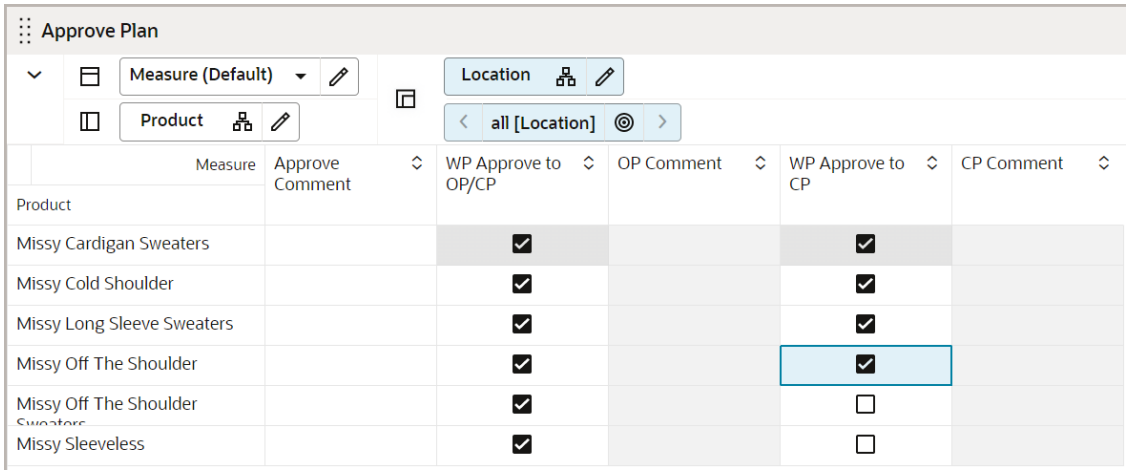
- In the WP Comment measure, enter approval comments.

  The WP Approval Comments will be copied to the OP Approval Comments and concatenated with the approver's ID, for future reference in this view.

- Run the Approve Plan Application Action.

  Note that the Approve Plan Application Action creates the OP and CP versions of the plan.

Figure 10-13 Approve Plan View



Measure Table

Table 10-11 Approve Plan View Measures

Label	Definition
WP Approve to OP/CP	CP Boolean flag measure that when selected, approves the Working Plan Item Plan to the Original Plan and the Current Plan.
WP Comments	Comments entered here will be copied to the OP Approval Comments and concatenated with the approver's ID, for future reference in this view.
OP Comments	Original Plan comments used as a reference.

Measure Profile

Default Profile

The Default profile is used to approve the Item Plan to the OP and CP versions.

Application Action

Approve Plan

The Approve Plan Application Action copies data from the Working Plan (WP) to the Original Plan (OP) and Current Plan (CP).

11
Item Planning

Before the beginning of a seasonal item's lifecycle, Pre-season Item Planning takes place. You have the option of planning regular and promotional sales by item, as well as the weekly receipt plan to support sales. The Item Plan uses the approved Assortment Plan as the starting point for the plan which can either come from an external Assortment Planning tool or the Assortment Strategy described in the previous chapter. You can plan basics in the Item Planning Basics workbook across multiple seasons and then use the Item Planning template to plan seasonal items and aggregate both basics and seasonal items to reconcile against Targets.

Typical Business Users

The typical business user who completes this task will be an Assortment Planner. The Planner usually will have completed the Assortment Planning process and is now ready to plan the execution of that assortment plan in the Item Planning process.

Data Requirements

- Approved location clusters
- Location hierarchy
- Product hierarchy
- Calendar hierarchy
- Sales Retail, Sales Unit, and Cost actuals
- Curve Library
- Item attributes and attribute values
- Item images loaded by the Administrator (optional)

Create the Item Planning Segment

When working in a segment, it is a common practice to keep the wizard selections for the segment size limited to what will be worked on, to facilitate navigation and increase UI responsiveness.

To create the Item Planning segment:

1. Click the **Assortment Services** task in the Tasks menu. Then, click the **Planning Services** activity and then the Item Planning task.
2. The dialog to create the new plan opens. Click **Create New Plan**.
3. Enter a descriptive Plan Label in the text field. Click **Ok**.
4. In Select Product, select one or multiple subcategories or select the product attribute to filter the products for a specific attribute and click **Next**, thus limiting the number of items you are working on.

5. In Select Assortment Period, select the time period for this assortment.
   - The Assortment Groups visible in the wizard are pre-ranged to the subcategories selected in the previous screen.
   - To see the user-defined assortment information, click the Dimension tile and select Assortment Detail.

> **Note:**
>
> Assortment Details can vary by subclass. If multiple subcategories are selected, the details shown will be based on the first order subclass.

Click **Finish**. The Item Planning segment is built.

Pre-season Item Planning Process Steps

The high-level steps to complete this process:

- To start with Pre-season planning process, review targets from Assortment Strategy, Forecast and MFP.
- Plan Sales and Margin by item.
- Create a receipt and inventory plan by item.
- Reconcile to the targets.
- Split final Receipts by size.
- Approve the Pre-season item plan.

In-season Item Planning Process Steps

The high-level steps to complete this process:

- Review trends based on actual performance.
- Generate forecast for the remaining season/un-elapsed season.
- Replan Sales and Margin by item.
- Replan receipt and inventory by item.
- Review and resolve real-time alerts.
- Compare the new plan to the Original Plan and to MFP.
- Approve the item plan to the Current Plan.

Pre-season Item Planning

Once Required parameters are set and reviewed in the planning setup step, the Pre-season item planning process starts by reviewing targets, planning Sales and Margin, followed by planning Receipts and Inventory. You can create a unit target from the CP from Assortment Strategy, create a unit target from forecast or create a unit target using MFP. After seeding the target from one of the sources, you can review the start and end week of the season and also select the sales curve. The purpose of this step is to create unit targets for each item, to be used in the creation of the sales plan. This can be performed at the cluster level or higher.

Tabs and Views in Pre-season Item Planning:

- **Planning Setup Tab:**
  - Define Filter View
  - Define Product Rollup View
  - Review Curve Library View
- Sales and Margin Tab:
  - Define Parameters View
  - Plan Sales and Margin View
  - Reconcile to MFP View
  - Review Deviation View
  - Review Targets View
- Receipts and Inventory Tab:
  - Define Parameters View
  - Plan Receipts and Inventory View
  - Reconcile to MFP
- Receipts by Size Tab:
  - Seed Size Profile View
  - Review Size Profile View
  - Receipts by Size View

Planning Setup Tab

The Planning Setup tab consists all the selections or thresholds you need to define to drive decisions during the item planning process. This tab consists of various views to set thresholds, attribute preferences to be used while reviewing data for various groups of product attributes, reviewing the curve library and so on.

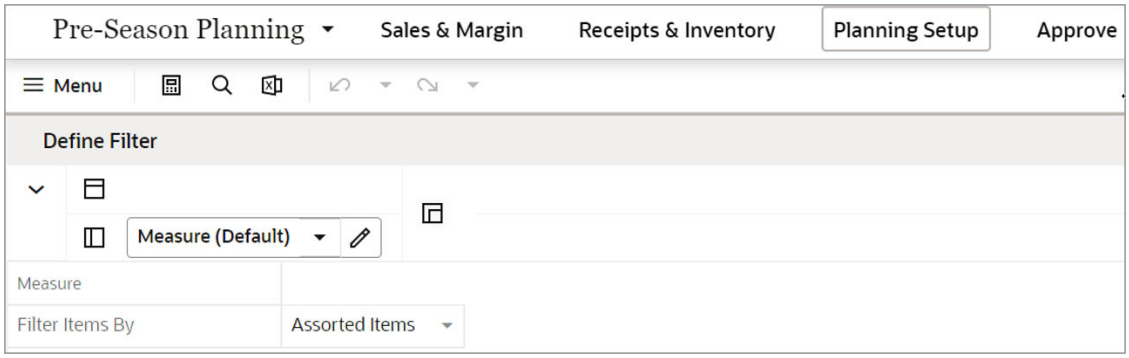
Define Filter View

Use this view to define filtering criteria to select the real-time alert to filter items.

The step to complete this process:

- Select the option of either Assorted Items or Inventory Stock Alerts from the drop-down list

Figure 11-1 Define Filter View



Measure Table

Table 11-1 Define Filter View Measures

Label	Definition
Filter Items By:	Drop-down list used to select a real-time alert to filter items.

Define Product Rollup View

The Define Product Rollup view is used to select product attributes to view in an alternate hierarchy. This is available in the tab to display the item level. Nested product attribute rollup has been provided with three levels. You can set up to three different combinations for nested rollup with a maximum of three levels in each combination.

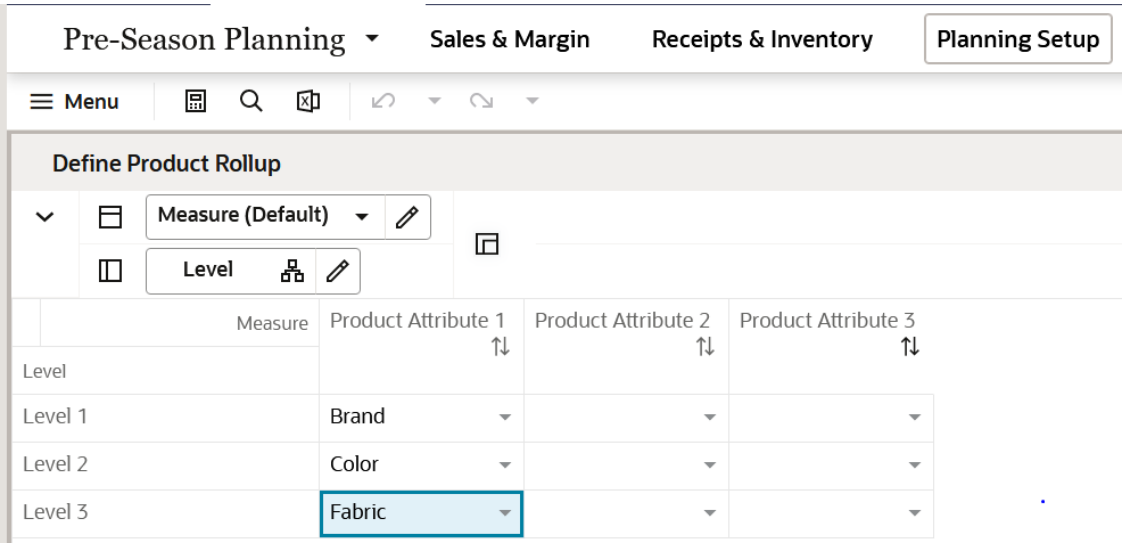
For example: as a first combination, you select Brand as a Level 1, Color as Level 2, and Fabric as Level 3 by clicking the list of attributes available in that category. This allows you to rollup your items by brand, then color inside each brand, and then by fabric inside each color.

This feature allows you to analyze and review the proposed assortment based on important attributes. You may select up to three attributes at a time for the dynamic rollup.

The steps to complete this process:

- Select up to three dynamic product attributes from the drop-down list.
- Run the Refresh Product Rollup Application Action.
- To view the product attribute:
  - In a view that displays the item level, click the Product Hierarchy tile.
  - Select the attribute (Attribute 1, 2, or 3) that you would like to view in the nested dynamic rollup.
  - Click **OK**.

Figure 11-2 Define Product Rollup View



Measure Table

Table 11-2 Define Product Rollup View Measures

Label	Definition
Product Attribute 1, 2, 3	Drop-down list to present product attributes for a dynamic product hierarchy rollup.

Measure Profiles

Default Profile

The Default profile is used to select dynamic product attributes.

Application Action

Refresh Product Rollup

The Refresh Product Rollup Application Action creates dynamically updated alternate hierarchies based on user-defined attribute selections. After running the Application Action, you may select the alternate product hierarchy to see rollups based on the attribute selections.

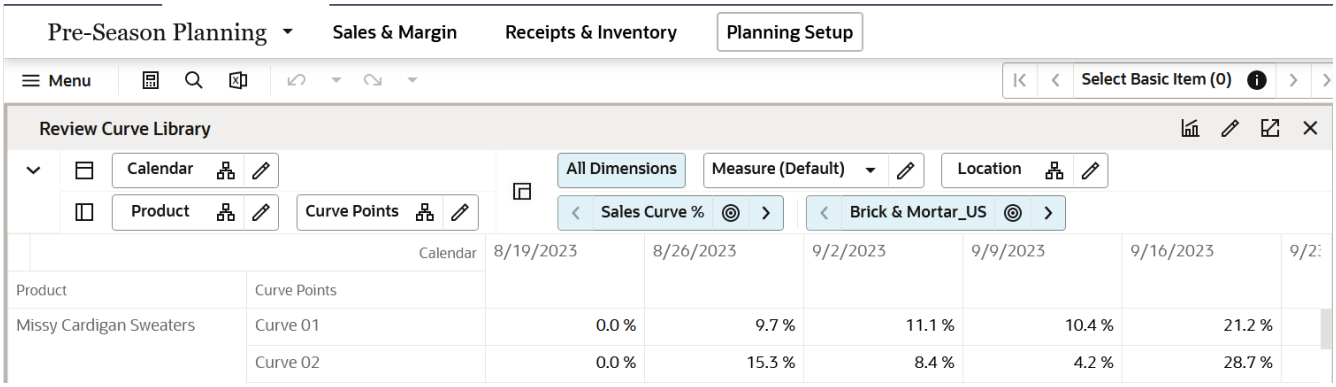
Review Curve Library View

The Review Curve Library view is a reference-only view used to review curves that were set up in Curve Maintenance. The curves can be applied to the sales, to intelligently spread sales over time, which is later used for planning receipt flows. For more information about the different types of curves and their functionality, see the Curve Maintenance task.

The step to complete this process:

- Review the sales percent to totals for each curve, as necessary.

Figure 11-3 Review Curve Library View



Measure Table

Table 11-3 Review Curve Library View Measures

Label	Definition
Sales Curve %	Used to

Measure Profiles

Default Profile

The Default profile is used to view each curve.

Sales and Margin Tab

The next sub-step in the Pre-season Item Planning process is Sales & Margin. This step is used to define parameters such as whether the item will be assorted in a particular cluster, start and end selling date overrides, and adjustments of regular, and promotional sales and so on.

Define Parameters View

The Define Parameters view is used to assign a curve and seed sales for each item and location cluster. If all items within a subclass and all clusters receive the same data, you can rollup to subclass and All Location in the product and location hierarchies, respectively.

The steps to complete this process:

- In the WP Assorted Item Boolean measure, select the items that will be included in the assortment.

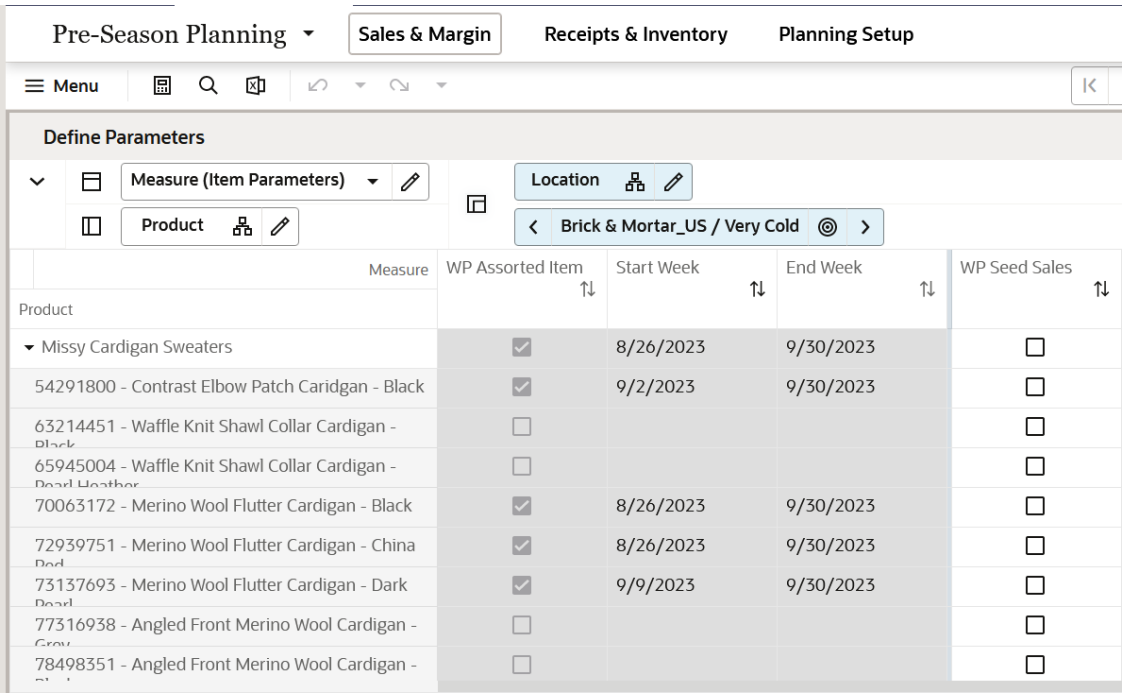
  This will populate the start and end selling week dates based on the defined Assortment Period.
- Optionally, override the start and end selling week dates.
- In the WP Seed Sales measure, select the Boolean.
- In the WP Seed Sales Source measure, select a data source to seed sales from:
  - Target Using Selected Curve: Sales TGT is defined in the Target Review step.

  - If this is the source selected, the WP Curve Source must also be defined.
  - Last Year: last year.
  - Like Item LY: like item last year.
  - Forecast: forecast.
  - If this is the source selected, then WP Like Item and WP Like Item % must also be defined.
- In the WP Curve Source measure, select the curve from which to seed sales.

  Curves were set in the Assortment Maintenance segment and can be referenced in the Review Curve Library view.
- If you want to assign a like item, in the WP Like Item measure, select the existing item to assign to the new item.

  In the Like Item % measure, assign an adjustment ratio for the existing item sales to be copied to the new item.

Figure 11-4 Define Parameters View



Measure Table

Table 11-4 Define Parameters View Measures

Label	Definition
WP Assorted Item	A Boolean flag measure used to indicate that an item is carried in the approved Assortment Plan.
Start Week	The first week of the Assortment Period.
End Week	The last week of the Assortment Period.

Table 11-4 (Cont.) Define Parameters View Measures

Label	Definition
WP Seed Sales	A Boolean flag measure that when selected creates a weekly sales plan for assorted items.
WP Seed Sales Source	A drop-down list used to select the flow source for an item's sales.
WP Curve Source	A drop-down list used to select the curve source for an item's sales.
WP Like Item	An item used to populate the Sales R, U, and GM R of a new item being added to the assortment using an adjustment ratio.
WP Like Item %	Provides a facility to adjust a new item's Sales R, U, and GM R by using a percentage ratio to the sales of the like item.

Measure Profiles

Default Profile (Item Parameters)

The Default profile is used to assign item parameters before flowing sales.

Plan Sales and Margin View

The next sub-step in the Pre-season Item Planning process is Sales & Margin. The Plan Sales and Margin view is used to plan regular and promotional sales by item, week, and location cluster.

Running the Create Weekly Sales Application Action creates the following logic for each Assorted Item denoted by the WP Assorted Item Boolean flag being checked:

Source Sales Units are spread to week based on the source selected.

Units are multiplied by the Base Unit Price and Base Unit Cost to get Retail and Cost.

Base Unit Price and Cost are interfaced from a source system for existing items and entered for placeholder items in the Item Administration segment.

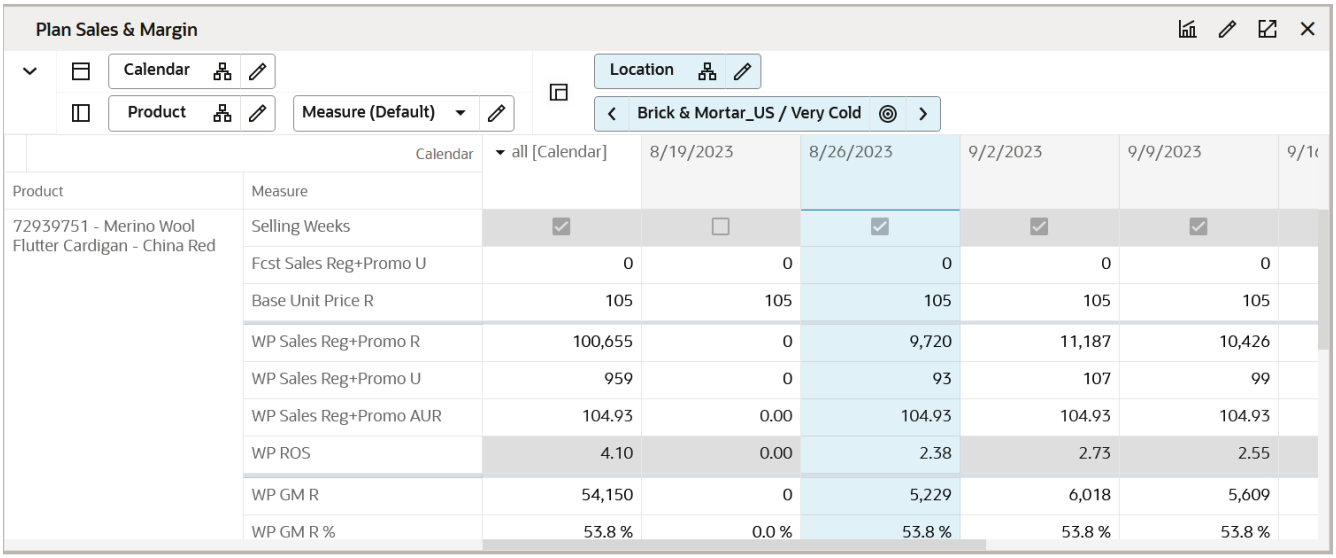
The steps to complete this process:

- Review and adjust each item/week/cluster Regular and Promotional Sales:
  - It is a best practice to seed sales before planning the sales buckets so that there is a demand curve in Reg and Promo Sales from which to begin your plan.
  - If there is no seeding and no prior data entered, then planning WP Sales will spread proportionally (since there is no demand curve the data will spread evenly) to Reg and Promo Sales.

    If that is not the desired behavior, plan Reg Sales and Promo Sales before planning Sales, so that a demand curve is in place before planning WP Sales.
- Review and adjust Sales after having planned Regular and Promotional Sales, if necessary.

  User-Defined Exceptions are a helpful way to identify exceptions that would need to be manually adjusted. For detailed information on these capabilities, see the *Oracle Retail Predictive Application Server Cloud Edition User Guide*.
- Review AUC and GM measures to ensure the financial viability of the plan.

Figure 11-5 Plan Sales and Margin View



Measure Table

Table 11-5 Plan Sales and Margin View Measures

Label	Definition
Selling Weeks	A Boolean flag measure used to indicate the week the item begins selling in the assortment.
WP Sales Reg R, U, AUR	Regular Sales Retail, Units, and Average Unit Retail.
WP ROS	Working Plan Rate of Sales.
WP Sales Promo R, U, AUR	Promotional Sales Retail, Units, and Average Unit Retail.
WP Sales GM R, GM R %	Sales Gross Margin value and Gross Margin percent for an item.
Fcst Sales U	Forecasted Sales Units from IPOCS-Demand Forecasting.
Base Unit Price R	An item's retail value, that can differ by location.
WP Sales R, U, C, AUR, AUC	Working Plan Sales Retail, Units, Cost, Average Unit Retail, and Average Unit Cost.

Measure Profile

Default Profile

The Default profile is used to plan regular and promotional sales by item and cluster.

Last Year Profile

The Last Year profile is used to review last year Regular and Promotional data compared to the working plan.

Original Plan Profile

The Original Plan profile is used to review the most recently approved Item Plan Original Plan (OP) Regular and Promotional data compared to the working plan.

Reconcile to MFP View

The Reconcile to MFP view is used to compare the working plan of the item plan to the approved MFP Current Plan (MFP Tgt) for each subclass and cluster.

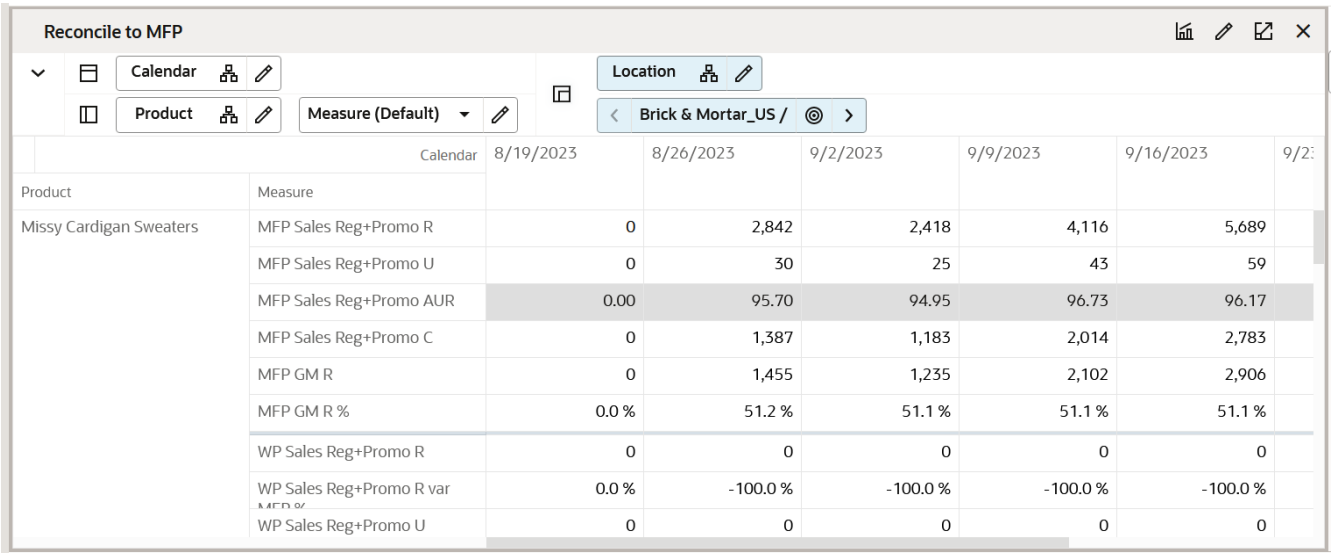
The steps to complete this process:

- Review WP Sales var MFP Tgt % measures to identify variances that are outside of acceptable parameters.
- Review Sales R, Sales U, Sales C, and GM variances to ensure that all of the financial numbers meet targets.
- Make adjustments to the sales and the receipt plans to be within an acceptable variance.

Repeat this process for each subclass and cluster in the assortment.

> **Note:**
>
> If a Location Plan is not available, the MFP CP view displays the MFP Current Plan by subclass spread to Location using last year's location sales' proportionality. If a Location Plan is available, the MFP CP view displays the MFP Current Plan by subclass spread to Location using the Location Plan CP sales' proportionality.

Figure 11-6 Reconcile to MFP View



Product	Measure	8/19/2023	8/26/2023	9/2/2023	9/9/2023	9/16/2023	9/2
Missy Cardigan Sweaters	MFP Sales Reg+Promo R	0	2,842	2,418	4,116	5,689	
	MFP Sales Reg+Promo U	0	30	25	43	59	
	MFP Sales Reg+Promo AUR	0.00	95.70	94.95	96.73	96.17	
	MFP Sales Reg+Promo C	0	1,387	1,183	2,014	2,783	
	MFP GM R	0	1,455	1,235	2,102	2,906	
	MFP GM R %	0.0 %	51.2 %	51.1 %	51.1 %	51.1 %	
	WP Sales Reg+Promo R	0	0	0	0	0	
	WP Sales Reg+Promo R var MFP %	0.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	
	WP Sales Reg+Promo U	0	0	0	0	0	

Measure Table

Table 11-6 Reconcile to MFP View Measures

Label	Definition
MFP Sales Reg + Promo R, U, C, AUR, GM R, GM R%	MFP Full price Sales Retail, Units, Cost, Average Unit Retail, Gross Margin Retail, Gross Margin Retail %

Table 11-6 (Cont.) Reconcile to MFP View Measures

Label	Definition
WP Sales Reg + Promo R, U, AUR, C,AUC, GM R, GM R%	IP Working Plan Retail, Units, Average Unit Retail, Cost, Average Unit Cost, Gross Margin value, Gross Margin percent.

Review Deviation View

This view focuses on providing the history of the sales deviation of each store in variance to the average. Deviations act as a decision point to decide what a store assortment should look like. Deviations are simply the variance to a mean. This helps you to plan a tighter assortment for stores selling less than the average and a larger assortment for stores selling better than the average.

Measure Table

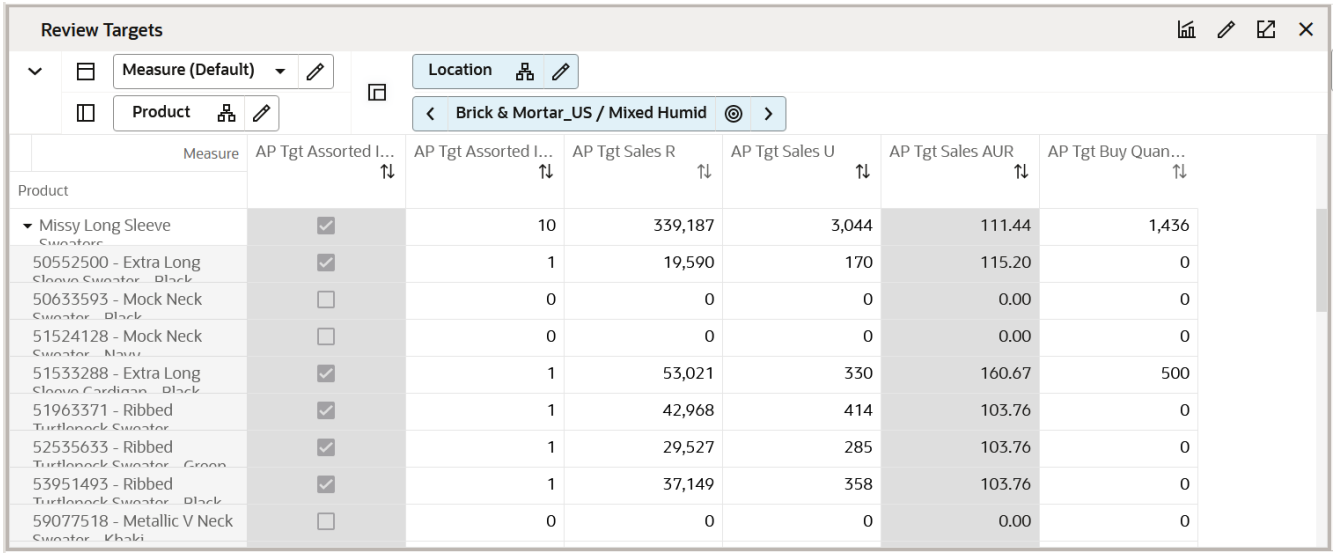
Table 11-7 Review Deviation View Measures

Label	Definition
LY STDDEV Sales R	Last Year Standard Deviation of Sales Retail calculated at cluster and higher levels.
LY STDDEV Sales U	Last Year Standard Deviation of Sales Units calculated at cluster and higher levels.
LY Deviation to Mean Sales@ Cluster R	Last Year Deviation of Sales R of Store from the mean at Cluster level and higher.
LY Deviation to Mean Sales@Cluster U	Last Year Deviation of Sales U of Store from the mean at Cluster level and higher.
LY Deviation to Mean Sales@ Channel R	Last Year Deviation of Sales R of Store from the mean at Channel level and higher.
LY Deviation to Mean Sales@ Channel U	Last Year Deviation of Sales U of Store from the mean at Channel level and higher.

Review Targets View

In the Review Targets view, you can review the targets from the assortment planning and also rollup to the needed attributes that are important to review or analyze.

Figure 11-7 Review Targets View



Product \ Measure	AP Tgt Assorted I...	AP Tgt Assorted I...	AP Tgt Sales R	AP Tgt Sales U	AP Tgt Sales AUR	AP Tgt Buy Quan...
Missy Long Sleeve Sweaters	☑	10	339,187	3,044	111.44	1,436
50552500 - Extra Long Sleeve Sweater - Black	☑	1	19,590	170	115.20	0
50633593 - Mock Neck Sweater - Black	☐	0	0	0	0.00	0
51524128 - Mock Neck Sweater - Navy	☐	0	0	0	0.00	0
51533288 - Extra Long Sleeve Cardigan - Black	☑	1	53,021	330	160.67	500
51963371 - Ribbed Turtleneck Sweater	☑	1	42,968	414	103.76	0
52535633 - Ribbed Turtleneck Sweater - Green	☑	1	29,527	285	103.76	0
53951493 - Ribbed Turtleneck Sweater - Black	☑	1	37,149	358	103.76	0
59077518 - Metallic V Neck Sweater - Khaki	☐	0	0	0	0.00	0

Measure Table

Table 11-8 Review Targets View Measures

Label	Definition
AP Tgt Assorted Item	A Boolean flag measure used to indicate that an item is carried in the approved Assortment Plan, best viewed at the subclass and/or category level by cluster or All Location.
AP Tgt Assorted Item Count	The number of items carried in the approved Assortment Plan.
AP Tgt Buy Quantity	The Assortment Plan Current Plan Buy Quantity Units.
AP Tgt Sales R, U, AUR	The Assortment Plan Current Plan Sales Retail, Units, and Average Unit Retail values.

Receipts and Inventory Tab

The Receipts and Inventory tab allows you to define parameters such as BOS inventory, initial buys, lead time, presentation minimums, and safety stock, among other parameters.

The steps to complete this process:

- Set inventory parameters.
- Seed receipts.
- Adjust receipts and inventory based on the sales plan.

Flow Receipts

The Flow Receipts Application Action populates a weekly receipt plan based on the parameters Order Frequency, Pres Mins, and Safety Stock Weeks.

Round Receipts

The Round Receipts Application Action uses the inputs of WP Pack Size U and WP Min Order Quantity to round receipts up to match these parameters.

Refresh Product Rollup

The Refresh Product Rollup Application Action creates dynamically updated alternate hierarchies based on user-defined attribute selections. After running the Application Action, you may select the alternate product hierarchy to see rollups based on the attribute selections.

Define Parameters View

The Define Parameters view is used to assign inventory and receipt parameters to flow receipts. Based on the parameters, the system will calculate the optimal receipt flow to support the sales plan.

The step to complete this process:

- In the WP Flow Receipts measure, select the Boolean.
- In the WP BOS U, BOS C, and BOS AUC measures, set the expected beginning of season inventory levels for each item, if known.

  If an item is a carryover item, it will inherit its projected EOP for the Start Sell week and populate the BOP.
- Entering a BOS would not be necessary for this scenario.

  Planning the BOS will populate the first week BOP of the Assortment Period, visible in the Receipts and Inventory tab.

  Plan two out of the three measures to calculate the third value.
- In the WP Initial Buy U, C, and AUC measures, enter the initial buy quantities for each item.

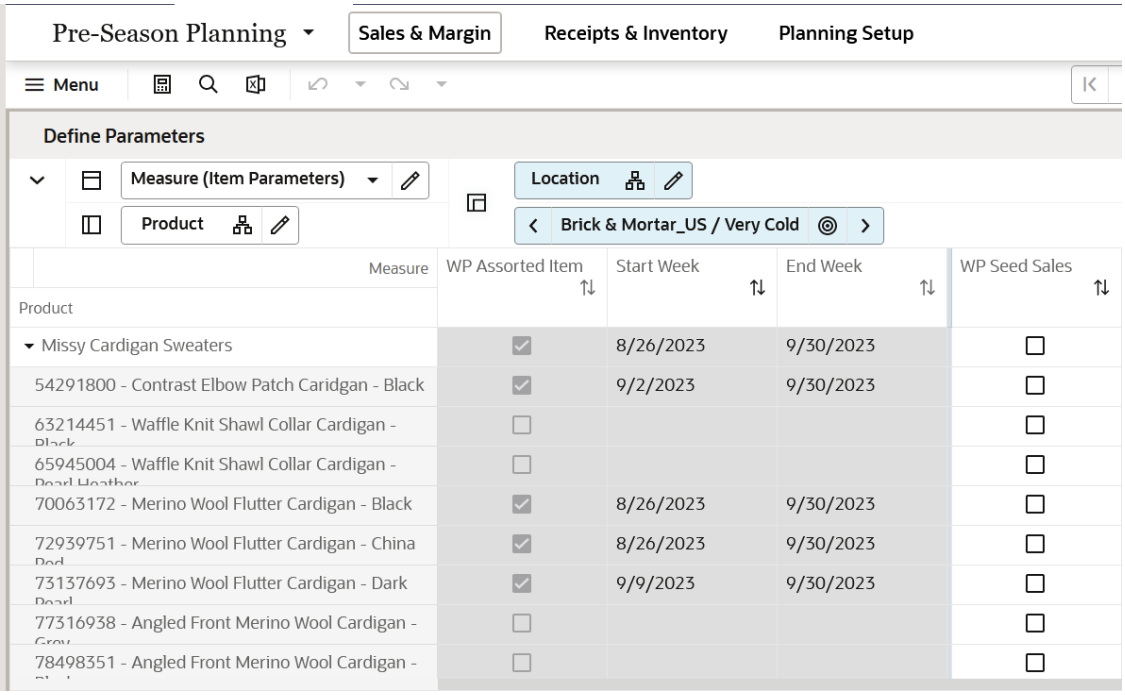
  Plan two out of the three measures to calculate the third value.
- In the WP Initial Receipt Lead Time measure, enter the number of weeks before the Start Sell week that receipts should be received.
- In the WP Lead Time (Days) measure, enter the number of days it takes for the product to arrive from your vendor/supplier to the warehouse or store.

  This measure is used to generate the Immediate Need real time alert in the In-season Planning segment, letting you know that your EOP is less than your Safety Stock.
- In the WP Order Frequency (Weeks) measure, enter how often receipts will arrive.

  For example, entering 1 means that receipts arrive every week and 2 means that receipts arrive every other week.
- In the WP Presentation Min U measure, enter the minimum amount of inventory on the sales floor per store.

  This is used only in calculating the initial buy and can be thought of as a fixture fill.
- In the Safety Stock (Weeks) measure, enter the number of weeks of sales that the safety stock should cover.

Figure 11-8 Define Parameters View



Measure Table

Table 11-9 Define Parameters View Measures

Label	Definition
WP BOS U, C, AUC	The planned Beginning of Season Units, Cost, and Average Unit Retail that populates the Beginning of Period (BOP) of the Assortment Period.
WP Initial Buy U, C, AUC	The planned initial buy Units, Cost, and Average Unit Retail.
WP Initial Buy U var Recommended %	The variance between the planner input Initial Buy and the system-recommended Initial Buy.
WP Recommended Initial Buy U, AUC	The system calculated recommended initial buy Units and Average Unit Cost based on Order Frequency, Presentation Minimums, Safety Stock Weeks, and the Sales plan.
WP Initial Receipt Lead Time	The number of weeks before the start sell week that the receipts should arrive. You can select the number of weeks from a drop-down list, with the maximum value being set in the Assortment Period Maintenance segment.
WP Lead Time (Days)	The number of days it takes for product to arrive from your vendor/ supplier to the warehouse or store. This measure is used to generate the Immediate Need real time alert in the In-season Planning segment, letting you know that your EOP is less than your Safety Stock.
WP Order Frequency (Weeks)	How often in weeks that receipts arrive.
WP Presentation Min U	The minimum amount of inventory on the sales floor per store. This is used only in calculating the initial buy and can be thought of as a fixture fill.

Table 11-9 (Cont.) Define Parameters View Measures

Label	Definition
WP Safety Stock (Weeks)	The number of future weeks of sales that additional units should be maintained to mitigate the risk of stockouts, based on future sales weeks. It is used for the initial buy as well as for subsequent receipt drops.
Tgt WOS	The planner entered targeted WOS by item/cluster, used in the Overage Real Time Alert.
WP Pack Size U	The number of units that come in a pack, used to round up receipts.
WP Min Order Quantity	The minimum order quantity, used to round up receipts.

Measure Profiles

Default Profile

The Default profile is used to assign receipt parameters before flowing receipts.

Application Actions Flow Receipts

The Flow Receipts Application Action populates a weekly receipt plan based on the parameters Order Frequency, Pres Mins, and Safety Stock Weeks.

Refresh Product Rollup

The Round Receipts Application Action uses the inputs of WP Pack Size U and WP Min Order Quantity to round receipts up to match these parameters.

Plan Receipts and Inventory View

The Plan Receipts and Inventory view is used to adjust net sales if necessary and adjust the receipt plan to meet sales needs based on business knowledge or constraints.

The steps to complete this process:

- Review the WP Net Sales U and make adjustments if necessary.
- Review the WP Receipts U and make adjustments to quantities or delivery weeks based on business knowledge.
- Review the WP EOP U to ensure there are no over or under-stock issues.

  If the receipt plan does not support the sales plan, a Real Time Alert will be activated to alert action is needed.

  Adjust the sales or the receipt plan to resolve the Real Time Alert.
- Review the WP WOS to view the calculated Weeks of Supply based on the sales and receipt plan.

  The WP WOS metric represents the number of future calendar positions that the current stock will cover. For example, If your calendar is aggregated to month, then WP WOS represents the future number of months that the stock will cover, if the calendar is aggregated to quarter, then it represents the number of quarters that the stock will cover.

  The WP WOS Weeks metric represents the inventory available to cover the future weeks at the week level irrespective of the calendar level selected.

For each week, WOS is calculated as the number of future weeks of sales covered by the current period's EOP U.

- Review the WP Sell Thru % as a reference value to see how fast inventory is projected to sell through.

  For each week, Sell Thru % is calculated as Net Sales Units / (BOP U + Receipts U).

- Review the Cost measures.

Repeat this process for each item and cluster in the assortment.

> **Note:**
>
> You can use Product Attributes to rollup your items by attributes. For example, this can be used to view inventory levels by attributes that are important to the category, to make sure that receipts are invested for important attributes.

Measure Table

Table 11-10 Plan Receipts and Inventory View Measures

Label	Definition
WP BOP U, C, AUC	The calculated Beginning of Period Units, Cost, and Average Unit Cost.
Net Sales U, C, AUC	Net Sales Units, Cost, and Average Unit Cost.
Receipts U, C, AUC	Receipts Units, Cost, and Average Unit Cost.
EOP C, AUC	The calculated End of Period Cost and Average Unit.
WP WOS	The number of future weeks of sales that will be covered by the current week's EOP U for the calendar level selected.
WP WOS Weeks	The number of future weeks of sales that will be covered by the current week's EOP U at the week level
Sell Thru %	The percent of inventory that will be sold during a period, calculated as Net Sales Units / (BOP U + Receipts U).

Measure Profiles

Real Time Alerts

Inventory Stock Thresholds

Alerts you that EOP Units is negative. Adjust the sales or the receipt plan to resolve the alert. The alert is activated when EOP is less than the Pres Min, and Safety Stock Weeks measures.

Default Profile

The Default profile is used to plan weekly receipts to cover the sales plan based on EOP inventory objectives.

Last Year Profile

The Last Year profile is used to compare the WP weekly receipts and inventory levels to last year values.

Original Plan Profile

The Original Plan profile is used to compare the WP weekly receipts and inventory levels to an approved Original Plan.

Application Action Refresh Product Rollup

The Refresh Attribute Rollup Application Action creates dynamically updated alternate hierarchies based on user-defined attribute selections. After running the Application Action, you may select the alternate product hierarchy to see rollups based on the attribute selections.

Reconcile to MFP

Use the Reconcile to MFP view to compare the working plan of the item plan to the approved MFP Current Plan (MFP Tgt) for each subclass and cluster.

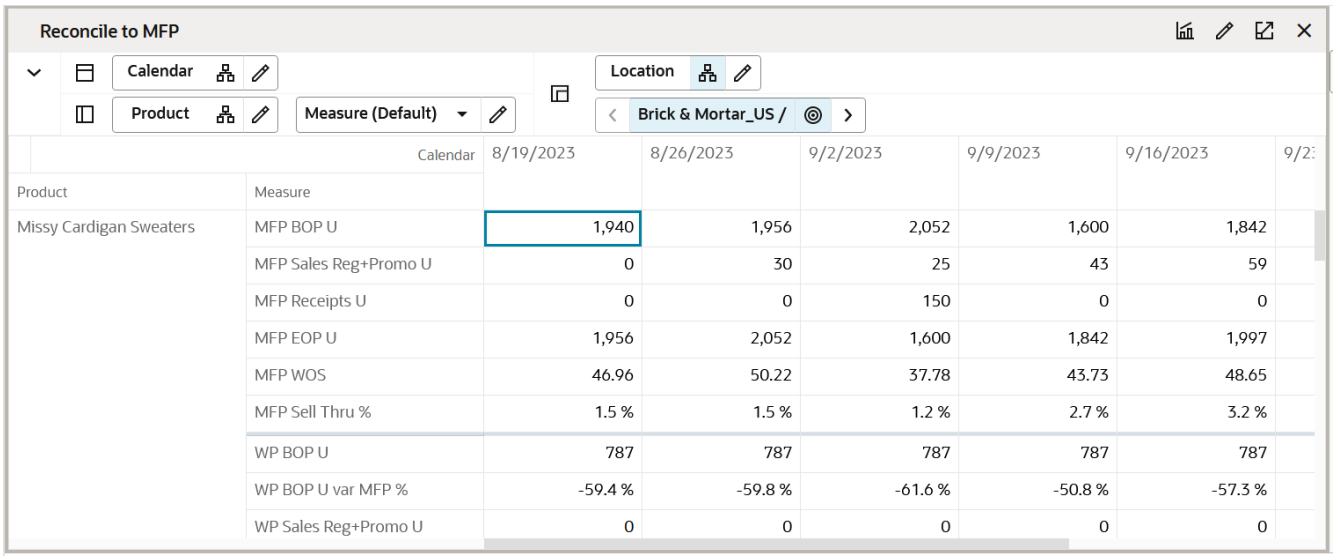
The steps to complete this process:

- Review WP Sales var MFP Tgt % measures to identify variances that are outside of acceptable parameters.
- Review Sales R, Sales U, Sales C, and GM variances to ensure that all of the financials meet targets.
- Make adjustments to the sales and the receipt plans to be within an acceptable variance.

Repeat this process for each subclass and cluster in the assortment.

> **Note:**
>
> If a Location Plan is not available, the MFP CP view displays the MFP Current Plan by subclass spread to Location using last year's location sales' proportionality. If a Location Plan is available, the MFP CP view displays the MFP Current Plan by subclass spread to Location using the Location Plan CP sales' proportionality.

Figure 11-9 Reconcile to MFP



Product	Measure	8/19/2023	8/26/2023	9/2/2023	9/9/2023	9/16/2023	9/2
Missy Cardigan Sweaters	MFP BOP U	1,940	1,956	2,052	1,600	1,842	
	MFP Sales Reg+Promo U	0	30	25	43	59	
	MFP Receipts U	0	0	150	0	0	
	MFP EOP U	1,956	2,052	1,600	1,842	1,997	
	MFP WOS	46.96	50.22	37.78	43.73	48.65	
	MFP Sell Thru %	1.5 %	1.5 %	1.2 %	2.7 %	3.2 %	
	WP BOP U	787	787	787	787	787	
	WP BOP U var MFP %	-59.4 %	-59.8 %	-61.6 %	-50.8 %	-57.3 %	
	WP Sales Reg+Promo U	0	0	0	0	0	

Measure Table

Table 11-11 Reconcile to MFP Measures

Label	Definition
MFP Sales Reg + Promo U, BOP U, Receipts U, EOP U, WOS, Sell Thru%	MFP Full price Sales Units, Beginning of Period inventory units, Receipts Units, End of Period inventory units, Weeks of Supply Units, Sell thru %.
MFP BOP U	MFP Beginning of Period Units
MFP Receipts U	MFP Receipts Units
MFP EOP U	MFP End of Period Units
MFP WOS	MFP Weeks of Supply
MFP Sell Thru %	MFP percent of inventory that will be sold during a period, calculated as Net Sales Units / (BOP U + Receipts U).
WP Sales Sales Reg + Promo U	IP Working Plan Sales Units
WP BOP U	The calculated Beginning of Period Units
Receipts U	Receipts Units
WP WOS	The number of future weeks of sales that will be covered by the current week's EOP U for the calendar level selected.
Sell Thru %	The percent of inventory that will be sold during a period, calculated as Net Sales Units / (BOP U + Receipts U).

Receipts by Size Tab

This tab is used to split the Buy Quantity by size based on the size profiles available.

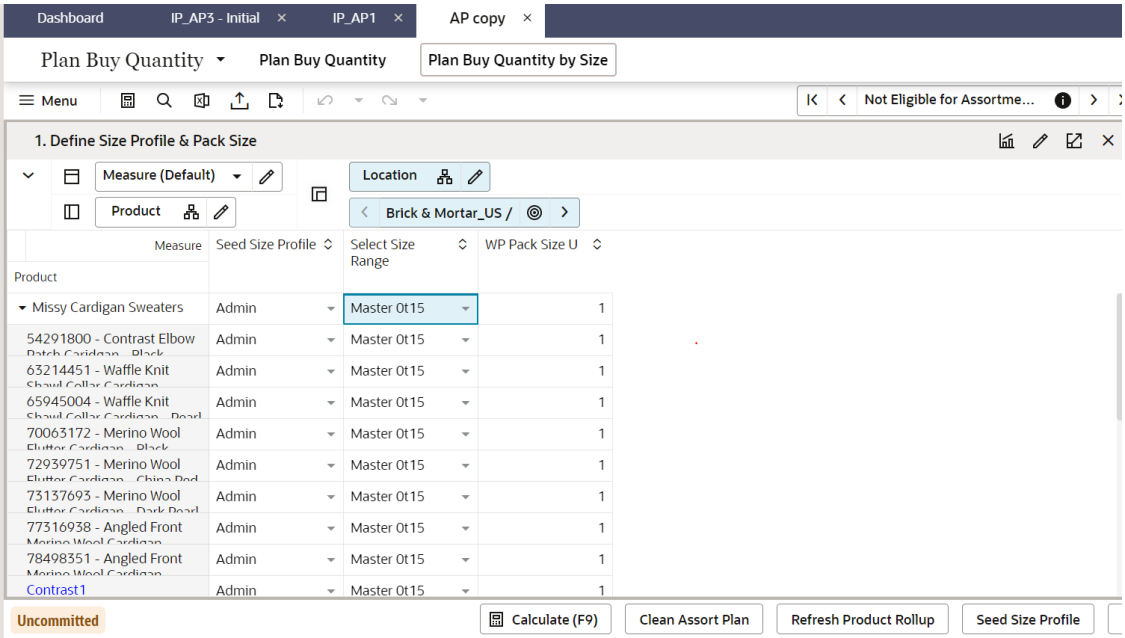
Seed Size Profile View

The Seed Size Profile view is used to seed the size profiles to split the Buy Quantity by Size. You have the option to seed the size profile from two sources. Seed from Admin will seed the size profile from Admin Size Profile % loaded by Admin or manually created by Admin. Seed from SPO will seed the size profile from the profile received from Oracle AI Foundation or any other external size profile and optimization engine. You are also allowed to set the pre-pack information for each size in the Wp Pack Size U measure. You should have determined the Buy Quantity before executing this step.

The step to complete this process:

- Choose the seed source from any of the available sources and run the Application Action, Seed Size Profile.

Figure 11-10 Seed Size Profile



Measure Table

Table 11-12 Seed Size Profile View Measures

Label	Definition
Seed Size Profile	Drop-down list measure to allow the planner to select the size profile source.
Select Size Range	Drop-down list showing available size ranges.
Wp Packsize U	Prepack information to round off the buy quantity by size to pack size. If no packsize is specified, it defaults to 1.

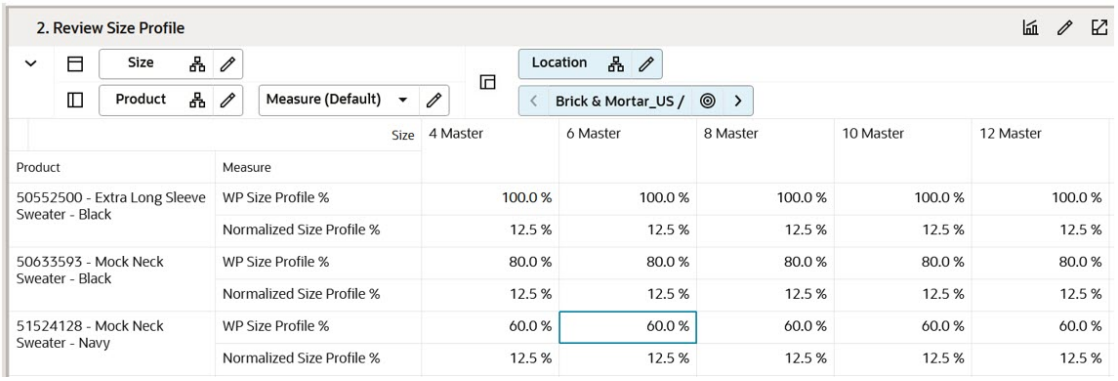
Review Size Profile View

The Review Size Profile view is used to review the selected size profiles. The view has the measure Wp Size Profile to show the percentage size split generated by the seeding action. This is further normalized to add up to 100 percent and can be viewed in the Normalized Size profile % measure.

The step to complete this process:

- Review the Wp Size profile % and Normalized size profile % measures to understand the size split percentage across each of the available sizes in the size range

Figure 11-11 Review Size Profile



Product	Measure	4 Master	6 Master	8 Master	10 Master	12 Master
50552500 - Extra Long Sleeve Sweater - Black	WP Size Profile %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %
	Normalized Size Profile %	12.5 %	12.5 %	12.5 %	12.5 %	12.5 %
50633593 - Mock Neck Sweater - Black	WP Size Profile %	80.0 %	80.0 %	80.0 %	80.0 %	80.0 %
	Normalized Size Profile %	12.5 %	12.5 %	12.5 %	12.5 %	12.5 %
51524128 - Mock Neck Sweater - Navy	WP Size Profile %	60.0 %	60.0 %	60.0 %	60.0 %	60.0 %
	Normalized Size Profile %	12.5 %	12.5 %	12.5 %	12.5 %	12.5 %

Measure Table

Table 11-13 Review Size Profile - Table View Measures

Label	Definition
WP Size Profile %	This measure shows the percentage split across each size as generated by the seed source action.
Normalized Size Profile %	This measure shows the normalized size profile.

Review Receipts by Size View

The Review Receipts by Size view is used to review the Receipts by the percentage split of sizes. The view has the measure WP Receipts U to show the initial/planned Receipts by Units. Wp Receipts by Size U is the final Wp Receipts U after splitting the Receipts by size and then rounding it by pack size information.

The step to complete this process:

- Review the WP Receipts U %, WP Receipts by Size U and the difference between the two.

Measure Table

Table 11-14 Review Receipts by Size - Table View Measures

Label	Definition
WP Receipts U	Planned Receipts by Units
WP Receipts by Size U	Receipts split by size and rounded by the pre-pack size
WP Receipts U diff to Size	Difference between the planned Receipts and Receipts split by size and rounded to pack size.

Approve Plan Tab

This tab is used to approve the plan.

Approve Plan View

The steps to complete this process:

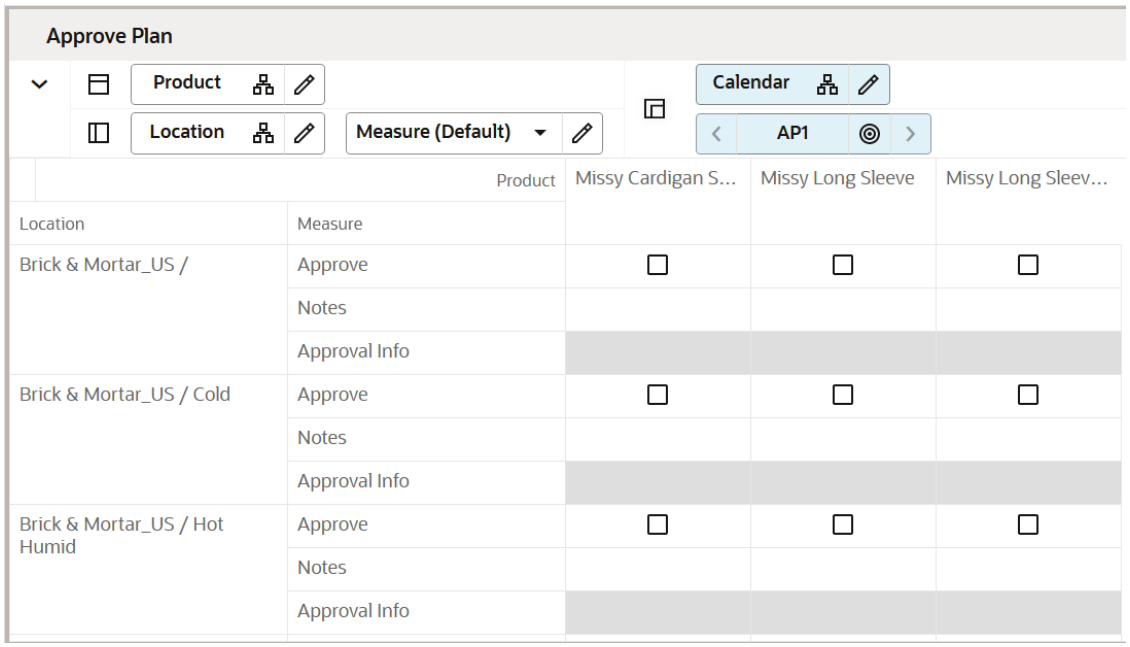
- In the WP Approve to OP/CP measure, select the Boolean flag for the subcategories and clusters that should be approved.

  If all subcategories and clusters should be approved at once, rollup to All Product and All Location and select the Approve to OP measure at that level.
- In the WP Comment measure, enter approval comments.

  The WP Approval Comments will be copied to the OP Approval Comments and concatenated with the approver's ID, for future reference in this view.
- Run the Approve Plan Application Action.

  Note that the Approve Plan Application Action creates the OP and CP versions of the plan.

Figure 11-12 Approve Plan View



Measure Table

Table 11-15 Approve Plan View Measures

Label	Definition
WP Approve to OP/CP	Boolean flag measure required to be checked to approve the Working Plan Item Plan to the Original Plan and the Current Plan.
WP Comments	Comments entered here will be copied to the OP Approval Comments and concatenated with the approver's ID, for future reference in this view.
OP Comments	Original Plan comments used as a reference.

Measure Profile

Default Profile

The Default profile is used to approve the Item Plan to the OP and CP versions.

Application Action

Approve Plan

The Approve Plan Application Action copies data from the Working Plan (WP) to the Original Plan (OP) and Current Plan (CP).

12
In-season Planning

This chapter details the In-season Planning process.

Typical Business Users

The typical business user who completes this task will be an Assortment Planner. The Planner usually will have completed the Item Planning process, and is now ready to update that plan based on actuals and trends.

Step 1: Trend Analysis

The first step in the In-season Item Planning process is Trend Analysis. You can select KPIs to review for Season To Date (STD), which are elapsed periods and Balance to Achieve (BTA), which are the remaining unelapsed periods in the segment. Based on these trends, Keep/Add/Drop decisions can be made for existing and new items.

Tab and Views in this Step:

- **Trend Analysis Tab:**
  - Filters and Parameters View
  - Trend Analysis View

Trend Analysis Tab

The Trend Analysis tab is used to analyze/review the trends and you can view style/ color.

Filters and Parameters View

The Filters and Parameters view is used to select the KPIs that will be used in the Trend Analysis view.

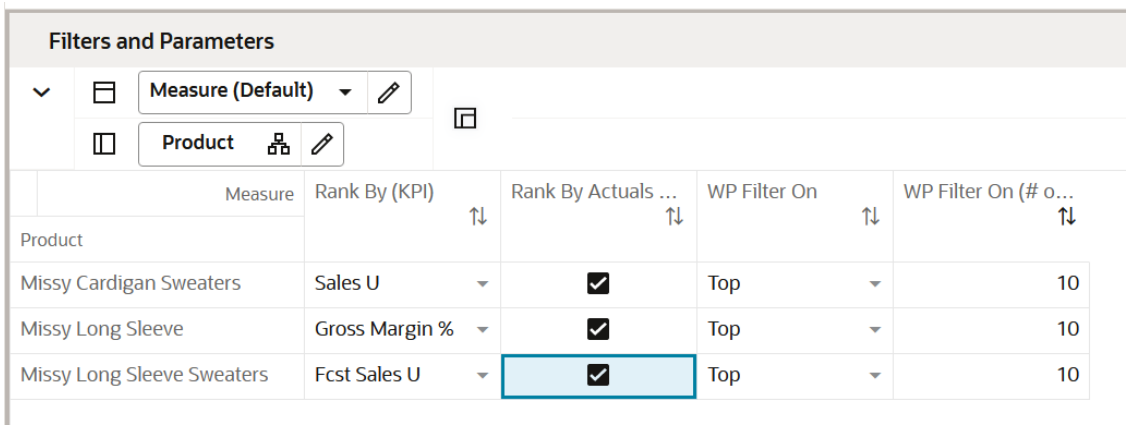
The steps to complete this process:

- In the Rank by (KPI) measure, select the KPI that you wish to review in Trend Analysis.
- If checked, the Rank by Actuals Only Boolean flag measure will rank items by actual sales results only.

  If left unchecked, the ranking will be based on actuals and plan.
- The WP Filter On and WP Filter On (# of Items) measures default to Top and 10, which will show the top 10 items in the Trend Analysis view.

  You can also choose to show the lowest ranked items by selecting Bottom from the WP Filter On measure drop-down list.
- Click **Calculate** to set your selections for view in the Trend Analysis view.

Figure 12-1 Filters and Parameters View



Measure Table

Table 12-1 Filters and Parameters View Measures

Label	Definition
Rank By (KPI)	Key Performance Indicators that can be used to rank items in the Trend Analysis view.
Rank by Actuals Only	When this Boolean flag is selected, the Trend Analysis view will only show Season To Date actuals.
WP Filter On	Drop-down list that allows the planner to select whether to rank the top or bottom items in the Trend Analysis view.
WP Filter On (# of Items)	A planner-entered number to display the selected number of items in the Trend Analysis view. The default is 10.

Measure Profile

Default Profile

The Default profile is used to select KPIs and set parameters for review in the Trend Analysis view.

Trend Analysis View

The Trend Analysis view is used to view Season To Date (STD) or Balance To Achieve (BTA) sales data to view variance to plan, as well as to facilitate focusing on exceptions through the top and bottom item performance reviews.

The steps to complete this process:

- Review the performance of the items by the parameter and filters that were defined in the Filters and Parameters view, using the variance measures to compare to Working Plan, Current Plan (Approved version), and LY.
- Update the KPIs, filters, and parameters as necessary and review the results in the Trend Analysis view.
- These reviews can be done by cluster or channel.

Measure Table

Table 12-2 Trend Analysis View Measures

Label	Definition
WP Sales R, U, ROS GM R%	Working Plan Sales Retail, Units, Rate of Sales, and Gross Margin percent.
ROS	The weekly rate of sales for the item/cluster/calendar periods that were selected in the wizard process.
Keep/Add/Drop	Drop-down list measure used to make In-season assortment changes.
Keep/Add/Drop Comments	Comments added for the status Keep/Add/Drop.
CP Sales R, U, ROS, GM R%	Current Plan Sales Retail, Units, Rate Of Sales, and Gross Margin percent.
LY Sales R, U, ROS, GM R%	Last Year Sales Retail, Units, Rate Of Sales, and Gross Margin percent.
WP Sales R/U Var CP %	Working Plan Retail, Units Variance to Current Plan.
WP Sales R/U Var LY%	Working Plan Retail, Units Variance to Last Year.

Measure Profile

Default Profile

The Default profile is used to view trends using selected KPIs.

Step 2: Sales and Margin

The next step in the In-season Planning process is Sales and Margin. This step is used to assign like items, seed sales if necessary, and replan sales and margin based on actual results.

The steps to complete this process:

- Define item parameters.
- Replan regular and promotional sales and margin based on actuals and updated information.

Tabs and Views in this Step:

- **Sales and Margin Tab:**
  - Define Parameters View
  - Plan Sales and Margin View
  - Reconcile to MFP View
- **Define Product Rollup Tab:**
  - Define Filter/Rollup View

Sales and Margin Tab

The Sales and Margin tab is used to replan Regular and Promotional sales by item and cluster based on actuals and known trends.

Define Parameters View

The Define Parameters view is used to review Assorted Items, Seed Sales, and assign like items by location cluster. If all clusters will receive the same data, you can rollup to All Location in the location hierarchy.

The steps to complete this process:

- If you have a new item, or an item that you would like to re-seed, select the WP Seed Sales Boolean.
- If you selected the Seed Sales Boolean, select the seed source from the WP Seed Source drop-down list measure:
  - Original Plan - the source for this data is from the Item Planning approved plan. If this option is selected, all the sales metrics will be seeded from the OP measures. This also includes Receipts, Customer Returns, Transaction, and Traffic measures.
  - Current Plan - the source for this data is from the In-season Planning approved plan. If this option is selected, all the sales metrics will be seeded from the CP measures. This also includes Receipts, Customer Returns, Transactions, and Traffic measures.
  - Forecast - the source for this data is Forecast Sales. If this option is selected, only the forecast sales will be copied to the regular sales.
  - Last Year - the source for this data is Last Year (if the item has data from the previous year). If this option is selected, only the total sales from last year will be copied to the regular sales. This does not include Receipts, however will include seeding of Customer Returns, Transaction, and Traffic measures.
- If you want to assign a like item, in the WP Like Item measure, select the existing item to assign to the new item
  - Like Item CP - the source for this data is the Current Plan from the selected Like Item. If this option is selected, all the sales metrics will be seeded from the CP measures. This also includes Receipts, Customer Returns, Transactions, and Traffic measures.
  - Like Item LY - the source for this is Last Year data from the selected Like Item. If this option is selected, only the total sales from last year will be copied to the regular sales. This does not include Receipts, however will include seeding of Customer Returns, Transaction, and Traffic measures.
  - In the Like Item % measure, assign an adjustment ratio for the existing item sales to be copied to the new item.
- Run the Seed Plan Application Action.

  Running the Seed Plan Application Action creates the following logic for each Assorted Item:
  - Source Sales Units are spread to week based on the source selected.
  - Units are multiplied by the Base Unit Price and Base Unit Cost to get Retail and Cost.
  - Base Unit Price and Cost are interfaced from a source system for existing items and entered for placeholder items in the Item Administration segment.
  - Wp plans can be cleared only for the un-elapsed periods.

> **Note:**
>
> Only un-elapsed periods will be updated with seeded data.

Measure Table

Table 12-3 Define Parameters View Measures

Label	Definition
Wp Assorted item	Boolean measure to highlight the assorted item.
Wp Start Week	Item Selling Start Week
Wp End Week	Item Selling End Week
WP Seed Sales	A Boolean flag measure that if selected, creates a weekly sales plan for assorted items.
WP Seed Sales Source	A drop-down list used to select the seed source for an item's sales.
WP Like Item	An item used to populate the Sales R, U, and GM R of a new item being added to the assortment using an adjustment ratio.

Measure Profiles

Default Profile

The Default profile is used to assign item parameters before seeding sales.

Application Action

Seed Plan

The Seed Plan Application Action populates an item's weekly sales based on the sales source selected.

Plan Sales and Margin View

The Plan Sales and Margin view is used to replan Regular and Promotional sales by item and location cluster.

The steps to complete this process:

- Use each of the Real Time Alerts to identify and locate items that need immediate attention. Resolve the alerts as appropriate.
- Review the Regular Sales for item/cluster/week combinations that are performing outside of expectations and make adjustments as necessary.
- Review ROS and Sell Thru % to ensure that sales and inventory are in line with expectations.
- Review the WP Sell Thru U var CP measure to understand the unit variance between your WP Sell Thru and CP Sell Thru.
- Review the WP Needed Sales Lift % measure to understand the sales lift % necessary to bridge the gap between your WP Sell Thru and CP Sell Thru.
- Review AUC and Gross Margin measures to ensure the financial viability of the plan.

- Repeat this process for each item and cluster in the assortment.
- Once all item/clusters/weeks have been planned, utilize the measure profiles to compare to LY, OP, and CP, as well as to reconcile to MFP.

Measure Table

Table 12-4 Plan Sales and Margin View Measures

Label	Definition
Selling Weeks	Boolean Measure
Fcst Sales Reg + Promo U	Forecasted Regular & Promotional Sales Units from AI Foundations Lite.
Base Unit Price R	An item's retail value that can differ by location.
WP ROS	The weekly rate of sales for the item/cluster/calendar periods that were selected in the wizard process.
WP Sales Reg+Promo R, U, AUR	Regular and Promotional Sales Retail, Units, and Average Unit Retail.
WP GM R, GM %	Gross Margin value and Gross Margin percent for an item.

Measure Profiles

Default Profile

The Default profile is used to plan Regular and Promotional sales by item and cluster.

Last Year Profile

The Last Year profile is used to review last year regular and promotional data compared to the working plan.

Original Plan Profile

The Original Plan profile is used to review the most recently approved Item Plan Original Plan (OP) Regular and Promotional data compared to the working plan.

Current Plan Profile

The Current Plan profile is used to review the most recently approved Item Plan Current Plan (CP) Regular and Promotional data compared to the working plan.

Reconcile to MFP View

The Reconcile to MFP view is used to compare the working plan of the item plan to the approved MFP Current Plan (MFP Tgt) for each subclass and cluster.

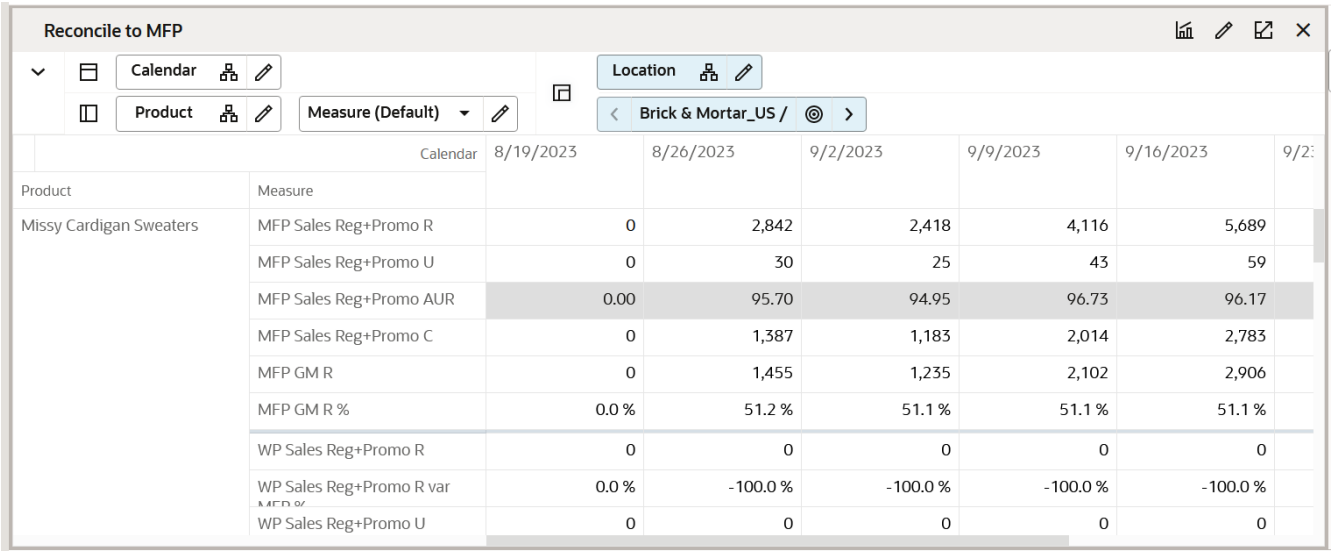
The steps to complete this process:

- Review WP Sales var MFP Tgt % measures to identify variances that are outside of acceptable parameters.
- Review Sales R, Sales U, Sales C, and GM variances to ensure that all of the financials meet targets.
- Make adjustments to the sales and the receipt plans to be within an acceptable variance.

Repeat this process for each subclass and cluster in the assortment.

> **Note:**
>
> If a Location Plan is not available, the MFP CP view displays the MFP Current Plan by subclass spread to Location using last year's location sales' proportionality. If a Location Plan is available, the MFP CP view displays the MFP Current Plan by subclass spread to Location using the Location Plan CP sales' proportionality.

Figure 12-2 Reconcile to MFP View



Product	Measure	8/19/2023	8/26/2023	9/2/2023	9/9/2023	9/16/2023
Missy Cardigan Sweaters	MFP Sales Reg+Promo R	0	2,842	2,418	4,116	5,689
	MFP Sales Reg+Promo U	0	30	25	43	59
	MFP Sales Reg+Promo AUR	0.00	95.70	94.95	96.73	96.17
	MFP Sales Reg+Promo C	0	1,387	1,183	2,014	2,783
	MFP GM R	0	1,455	1,235	2,102	2,906
	MFP GM R %	0.0 %	51.2 %	51.1 %	51.1 %	51.1 %
	WP Sales Reg+Promo R	0	0	0	0	0
	WP Sales Reg+Promo R var	0.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
	WP Sales Reg+Promo U	0	0	0	0	0

Measure Table

Table 12-5 Reconcile to MFP View Measures

Label	Definition
MFP Sales R, U, AUR, C, AUC, GM R, GMR%	MFP Sales Retail, Units, Average Unit Retail, Cost, Average Unit Cost, Gross Margin value, Gross Margin percent.
WP Sales Reg+Promo R, U, AUR	IP Working Plan Full Price Retail, Units, Average Unit Retail.

Define Product Rollup Tab

This tab is used to select item attributes to view in an alternate hierarchy.

Define Filter/Rollup View

The Define Filter/Rollup view is used to select item attributes to view in an alternate hierarchy. This is available in views that display the item level. For example, if you select Color as a product attribute, in the Create and Review Assortment steps, you can click the Product Hierarchy tile to select the attribute as an alternate hierarchy, and view the proposed assortment by Black, Red, Navy, and so on. This allows you to rollup your items by different attributes to analyze and review the proposed assortment based on important attributes. You may select one attribute at a time from the alternate hierarchy.

The steps to complete this process:

- Select up to three dynamic product attributes from the drop-down list.
- Run the Refresh Attributes Rollup Application Action.
- To set a filter:
  - In the **Filter Items By** measure drop-down list, select the real-time alert to filter by.
  - Click **Calculate**.
  - Go to a view that shows the item level and has the Filter function available. Click **Filter**.

Measure Table

Table 12-6 Define Filter/Rollup View Measures

Label	Definition
Product Attribute 1, 2, 3	Drop-down list to present product attributes for a dynamic product hierarchy rollup.
Filter Items By	Drop-down list used to select a real-time alert to filter items.

Measure Profile

Default Profile

The Default profile is used to select dynamic product attributes and filter items.

Application Action

Refresh Product Rollup

The Refresh Product Rollup Application Action creates dynamically updated alternate hierarchies based on user-defined attribute selections. After running the Application Action, you may select the alternate product hierarchy to see rollups based on the attribute selections.

Step 3: Receipts and Inventory

The next step in the In-season Planning process is Receipts and Inventory. Use his step to define parameters for use in Real Time Alerts, replan receipts based on the updated sales plan, validate open-to-buy, and review and resolve Real Time Alerts. Note that Net Sales are used for the sales plan.

The steps to complete this process:

- Review and update inventory parameters for use in inventory-driven Real Time Alerts, if necessary.
- Adjust receipts and inventory based on the updated sales plan, in the context of the plan and/or open to buy.
- Review and resolve Real Time Alerts.
- Reconcile the plan to MFP.

Tabs and Views in this Step:

- **Receipts and Inventory Tab:**
  - Inventory Parameters View
  - Plan Receipts and Inventory View
- **Define Product Rollup Tab:**
  - Define Filter/Rollup View

Application Actions

Round Receipts

The Round Receipts Application Action uses the inputs of WP Pack Size U and WP Min Order Quantity to round receipts up to match these parameters.

Refresh Product Rollup

The Refresh Product Rollup Application Action creates dynamically updated alternate hierarchies based on user-defined attribute selections. After running the Application Action, you may select the alternate product hierarchy to see rollups based on the attribute selections.

Receipts and Inventory Tab

Use the Receipts and Inventory tab for receipts and inventory.

Inventory Parameters View

The Inventory Parameters view is used to update and assign inventory and receipt parameters if they have changed from the Item Pre-season settings, or for new items for each location cluster.

The steps to complete this process:

- Wp Reforecast Receipts allows you to qualify style-colors to generate the receipts forecast again for the un-elapsed period. Select the checkbox with True to qualify the measures for re-forecasting and run the custom menu, **Re-forecast Receipts**.
- In the WP Lead Time (Days) measure, enter the number of days it takes for the product to arrive from your vendor/supplier to the warehouse or store.

  This measure is used to generate the Immediate Need Real Time Alert, letting you know that your EOP is less than your Safety Stock.
- In the TGT Sell Thru % measure, enter the targeted Sell Thru %.

  This measure is used to generate the Sell Thru Warning Real Time Alert, letting you know that your Sell Thru is higher or lower than your targeted Sell Thru.
- In the TGT WOS measure, enter the targeted Weeks of Supply.
- This measure is used to generate the Overage Real Time Alert, letting you know that your WOS is higher than your targeted WOS.
- In the WP Presentation Min U measure, enter the minimum amount of inventory on the sales floor per store.
- In the Safety Stock (Weeks) measure, enter the number of weeks of sales that the safety stock should cover.

Use this measure to use future weeks of sales to generate a dynamic safety stock recommendation. It is recommended to use Safety Stock (Weeks) to generate a recommended initial buy to be used in Real Time Alerts.

- In the WP Pack Size U measure, enter how many items come in a pack.

  This measure is used in conjunction with the Round Receipt Application Action to round receipts up to the pack size entered.

  For example, if your pack size is 10 and your receipts are 88, it will round up to 90 to meet the pack size.

- In the WP Min Order Quantity measure, enter a minimum order quantity.

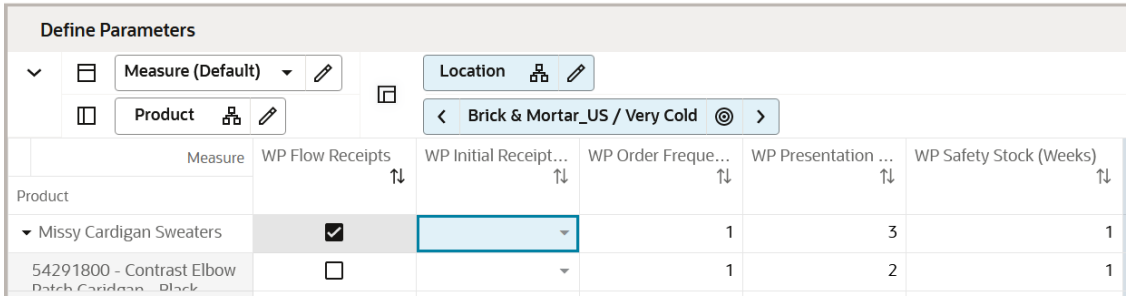
  This measure is used in conjunction with the Round Receipt Application Action to round receipts up to the minimum order quantity entered.

  For example, if your minimum order quantity is 100 and your receipts are 88, it will round up to 100.

- Click **Calculate.**
- Run the Round Receipts Application Action to round receipts using the Pack Size and/or Min Order Quantity measure inputs.

  Review your WP EOP, WP WOS and WP Sell Thru % after running the Round Receipts Application Action to ensure that you are not over-inventoried due to rounding up.

Figure 12-3 Inventory Parameters View



Measure Table

Table 12-7 Inventory Parameters View Measures

Label	Definition
Wp Reforecast Receipts	Boolean measure to qualify the style-colors for generating receipts forecast for the un-elapsed period in the season.
WP Lead Time (Days)	The number of days it takes for product to arrive from your vendor/ supplier to the warehouse or store, used in the Immediate Need Real Time Alert.
TGT Sell Thru %	The planner entered targeted Sell Thru % by item/cluster, used in the Sell Thru Warning Real Time Alert.
TGT WOS	The planner entered targeted WOS by item/cluster, used in the Overage Real Time Alert.
WP Presentation Min U	The minimum amount of inventory on the sales floor per store, used in the Inventory Threshold Real Time Alert.

Table 12-7 (Cont.) Inventory Parameters View Measures

Label	Definition
WP Safety Stock (Weeks)	The number of future weeks of sales that additional units should be maintained to mitigate the risk of stockouts, based on future sales weeks. It is used for the initial buy as well as for subsequent receipt drops as well as used in the Inventory Threshold, and Immediate Need.
WP Pack Size U	The number of units that come in a pack, used to round up receipts.
WP Min Order Quantity	The minimum order quantity, used to round up receipts.

Measure Profile

Default Profile

The Default profile is used to update receipt parameters.

Application Action

Round Receipts

The Round Receipts Application Action uses the inputs of WP Pack Size U and WP Min Order Quantity to round receipts up to match these parameters.

Plan Receipts and Inventory View

The Plan Receipts and Inventory view is used to readjust the receipt plan to meet sales trends based on business knowledge or constraints.

The steps to complete this process:

- Review the WP Receipts U, generate receipts forecast for the style-colors if required to adjust quantities or delivery weeks based on business knowledge, forecast generated and the updated sales plan.
- Review the WP EOP U to ensure there are no over or under-stock issues.

  If the receipt plan does not support the sales plan, a Real Time Alert will be activated to alert you that action is needed.
- Review the WP WOS to view the calculated Weeks of Supply based on the sales and receipt plan.

  The WP WOS metric represents the number of future calendar positions that the current stock will cover. For example, If your calendar is aggregated to month, then WP WOS represents the future number of months that the stock will cover, if the calendar is aggregated to quarter, then it represents the number of quarters that the stock will cover.

  The WP WOS Weeks metric represents the inventory available to cover the future weeks at week level irrespective of the calendar level selected.

  For each week, WOS is calculated as the number of future weeks of sales covered by the current period's EOP U.
- Review the WP Sell Thru % as a reference value to see how fast inventory is projected to sell through.

  For each week, Sell Thru % is calculated as Net Sales Units / (BOP U + Receipts U).

- Review the Cost measures.
- Repeat this process for each item and cluster in the assortment.
- Once all item/clusters have been planned, utilize the measure profiles to compare to LY, OP, and CP, as well as to reconcile to MFP.

Note that you can use Product Attributes to rollup your items by attributes. For example, this can be used to view inventory levels by attributes that are important to the category, to make sure that receipts are invested for important attributes.

Measure Table

Table 12-8 Plan Receipts and Inventory View Measures

Label	Definition
WP BOP U, C, AUC	The calculated Beginning of Period Units, Cost, and Average Unit Cost.
WP Net Sales U, C, AUC	Net Sales = Sales - Customer Returns Working Plan Net Sales Units, Cost, and Average Unit Cost.
WP Receipts U, C, AUC	Working Plan Receipts Units, Cost, and Average Unit Cost.
WP EOP U, C, AUC	The Working Plan calculated End of Period Units, Cost and Average Unit.
WP WOS	The number of future weeks of sales that will be covered by the current week's EOP U for the calendar level selected.
WP WOS Weeks	The number of future weeks of sales that will be covered by the current week's EOP U at the week level
WP Sell Thru %	The Working Plan percent of inventory that will be sold during a period, calculated as Net Sales Units / (BOP U + Receipts U).
On Order U, C, AUC	On Order Units, Cost, and Average Unit Cost.
WP OTB U	Open to Buy Units, calculated as: CP EOP U - WP EOPU + WP Receipts U - WP Net On Order U. Elapsed periods are always 0.
On Order U	On Order Units.
WP On Order Adj U	User-entered measure to plan updates to future weeks where Open To Buy needs to be updated to achieve the inventory plan, either due to high or low planned/ projected EOP.
WP Net On Order U	Read-only measure, calculated as WP On Order U + WP On Order Adj U.

Real Time Alerts

Inventory Threshold

The alert activates when the current week EOP units is less than the Pres Min and Safety Stock (Weeks) measures. This alert is used in the Item Planning and In-season Planning segments.

Immediate Need

The alert activates when the current week EOP units is less than the Lead Time Days for an item/cluster/week. Note that Lead Time Days are converted to week. This alert is used in the In-season Planning segment.

Overage

The alert activates when the WP WOS between the current week and the current week + WP Lead Time Days is greater than the TGT WOS and there are non-zero values in Receipt U or On Order U from the current week + WP Lead Time Days for an item/cluster/ week. This alert is used in the In-season Planning segment..

On Order Reconciliation

The alert will activate when WP On Order U is greater than zero and does not match WP Receipt U for an item/cluster/week. This alert is used in the In-season Planning segment.

Sell Thru Warning

The alert activates to green when the WP Sell Thru % is higher than you entered TGT Sell Thru % and activates to yellow when the WP Sell Thru % is lower than the TGT Sell Thru % for an item/cluster/week. This alert is used in the In-season Planning segment.

Measure Profiles

Default Profile

The Default profile is used to plan weekly receipts to cover the sales plan based on the updated sales plan EOP inventory objectives.

Last Year Profile

The Last Year profile is used to compare the WP weekly receipts and inventory levels to last year values.

Original Plan Profile

The Original Plan profile is used to compare the WP weekly receipts and inventory levels to an approved Original Plan.

Current Plan Profile

The Current Plan profile is used to compare the WP weekly receipts and inventory levels to an approved Current Plan.

Application Action

Refresh Product Rollup

The Refresh Product Rollup Application Action creates dynamically updated alternate hierarchies based on user-defined attribute selections. After running the Application Action, you may select the alternate product hierarchy to see rollups based on the attribute selections.

Define Product Rollup Tab

This tab is used to select item attributes to view in an alternate hierarchy.

Define Filter/Rollup View

The Define Filter/Rollup view is used to select item attributes to view in an alternate hierarchy. This is available in views that display the item level. For example, if you select Color as a product attribute, in the Create and Review Assortment steps, you can click the Product

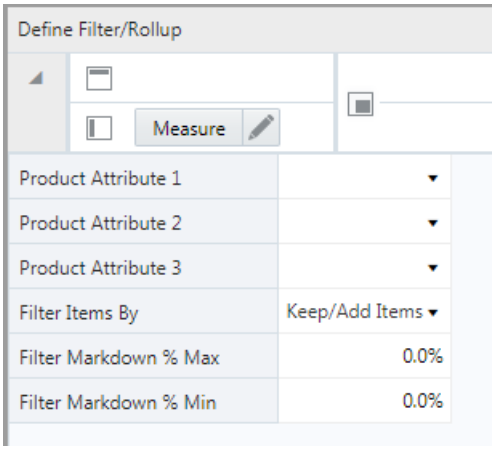
Hierarchy tile to select the attribute as an alternate hierarchy, and view the proposed assortment by Black, Red, Navy, and so on. This allows you to rollup your items by different attributes to analyze and review the proposed assortment based on important attributes. You may select one attribute at a time from the alternate hierarchy.

The Filter Items By drop-down list allows you to select one of the Real-Time Alerts and use it to filter the items on each view. One filter may be used at a time in the segment.

The steps to complete this process:

- Select up to three dynamic product attributes from the drop-down list.
- Run the Refresh Attributes Rollup Application Action.
- To view the product attribute:
  - In a view that displays the item level, click the Product Hierarchy tile.
  - Select the attribute that you want to view in the alternate hierarchy.
  - Click **OK**.

Figure 12-4 Define Filter/Rollup View



- To set a filter:
  - In the Filter Items By measure drop-down list, select the real-time alert to filter by.
  - Click Calculate.

Measure Table

Table 12-9 Define Filter/Rollup View Measures

Label	Definition
Product Attribute 1, 2, 3	Drop-down list to present product attributes for a dynamic product hierarchy rollup.
Filter Items By:	Drop-down list used to select a real-time alert to filter items.

Measure Profile

Default Profile

The Default profile is used to select dynamic product attributes and filter items.

Application Action

Refresh Product Rollup

The Refresh Product Rollup Application Action creates dynamically updated alternate hierarchies based on user-defined attribute selections. After running the Application Action, you may select the alternate product hierarchy to see rollups based on the attribute selections.

Step 4: Approve Plan

The final step in the In-season Planning process is the Approve Plan. This step approves the item plans that you have created, analyzed, and reviewed for accuracy. The output of this step is an approved Item Plan Current Plan.

The step to complete this process:

- Approve the item plan.

Tab and View in this Step:

- **Approve Plan Tab**:
  - Approve Plan View

Application Actions

Approve Plan

The Approve Plan Application Action copies data from the Working Plan (WP) to the Current Plan (CP).

Approve Plan Tab

This tab is used to approve the plan.

Approve Plan View

The steps to complete this process:

- In the WP Approve to OP/CP measure, select the Boolean flag for the subcategories and clusters that should be approved.

  If all subcategories and clusters should be approved at once, rollup to All Product and All Location and select the Approve to OP measure at that level.
- In the WP Comment measure, enter approval comments.

  The WP Approval Comments will be copied to the OP Approval Comments and concatenated with the approver's ID, for future reference in this view.
- Run the Approve Application Action.

> **Note:**
>
> The Approve Application Action creates the OP and CP versions of the plan.

Measure Table

Table 12-10 Approve Plan View Measures

Label	Definition
WP Approve to CP	Boolean flag measure that when selected approves the Working Plan Item Plan to the Current Plan.
WP Comments	Comments entered here will be copied to the CP Approval Comments and concatenated with the approver's ID, for future reference in this view.
CP Comments	Current Plan comments used as a reference.

Measure Profile

Default Profile

The Default profile is used to approve the Item Plan to the CP version.

Application Action

Approve Plan

The Approve Plan Application Action copies data from the Working Plan (WP) to the Current Plan (CP).

A

Appendix: Additional Information

This appendix covers the following topics:

- Real Time Alerts
- Alert Navigation
- Special Filters
- Special Filters Navigation
- Reclassification

Real Time Alerts

Real Time Alerts allows you to manage by exception. When dealing with large amounts of data at the Item/Location level, it can be difficult to search for and find items/locations that are performing outside of expectations. Real Time Alerts solve that issue by highlighting the most common issues and presenting them in an actionable format for the planner to resolve. Real Time Alerts help to simplify business processes by focusing your attention on prioritized, value-based activities.

The following real time alerts are defined on the application through configuration. The Buyer/Planner can add additional alerts as needed.

Invalid Definition - Define Label

This alert activates when the assortment definition does not have a label, start date, or end date with positive duration and/or non-overlapping assortment periods. This alert is used in the Assortment Period Maintenance segment under the Planning Maintenance activity.

Seed Source

This alert activates when the Curve Source Year is not defined before selecting the seed source. This alert is used in the Curve Maintenance segment under the planning Maintenance activity.

Product Attribute

This alert activates when the attribute value assignment is not defined for the placeholder positions created depending on the class-eligible attribute selected in the system. This alert is used in the Create Assortment segment under the Planning Services activity.

Carryover Options Minimum

This alert activates when the Carryover Options Shopped is less than the Target options (Carryover status) defined in the determine # of options. This alert is used in the Assortment Planning segment under the Planning Services activity.

New Options Minimum

This alert activates when the New Options Shopped is less than the Target options (New status) defined in the determine # of options. This alert is used in the Assortment Planning segment under the Planning Services activity.

Shop Option

This alert activates when the Option has been marked as mandatory and has not been considered in the assortment. This alert is used in the Create Assortment segment under the Planning Services activity.

Attribute Mix Difference to Max Target

This alert activates when the Attribute Mix Total does not match the max target options determined in the Target Mix by Attribute process. This alert is used in the Create Assortment segment under the Planning Services activity.

Fixture Capacity

This alert activates when the number of Options determined does not satisfy the minimum and maximum fixture capacity. This alert is used in the Create Assortment segment under the Planning Services activity.

Assorted Option

This alert activates when the Option has been marked as mandatory and has not been considered in the assortment. This alert is used in the Assortment Planning segment under the Planning Services activity.

Not Eligible for Mandatory

This alert activates when the Option has been checked as Mandatory in the Recommend Assortment process without considering it the Assorted Options since the status is blank. This alert is used in the Assortment Planning segment under the Planning Services activity.

Option Count Diff

This alert activates when the total Option Count by attribute is greater than the target Attribute Mix determined in the Target Mix by Attribute process. This alert is used in the Build Wedge segment under the Planning Services activity.

Inventory Stock Threshold

This alert activates when the current week EOP units is less then the Pres Min and Safety Stock (Weeks) measures. This alert is used in the Item Planning and In-season Planning segments.

Immediate Need

This alert activates when the current week EOP units is less then the Lead Time Days for an item/cluster/week. Note that lead time days are converted to week. This alert is used in the In-season Planning segment.

Net On Order

This alert activates when Net On Order is less than MFP. This alert is used in the In-season Planning segment.

Open to Buy

This alert activates when Open To Buy is less than MFP. This alert is used in the In-season Planning segment.

Overage

This alert activates when WP WOS between current week and current week + WP Lead Time Days is greater than the TGT WOS, and there are non-zero values in Receipt U or On Order U from current week + WP Lead Time Days for an item/cluster/week. This alert is used in the In-season Planning segment.

On Order Reconciliation

This alert activates when WP On Order U is greater than zero and does not match WP Receipt U for an item/cluster/week. This alert is used in the In-season Planning segment.

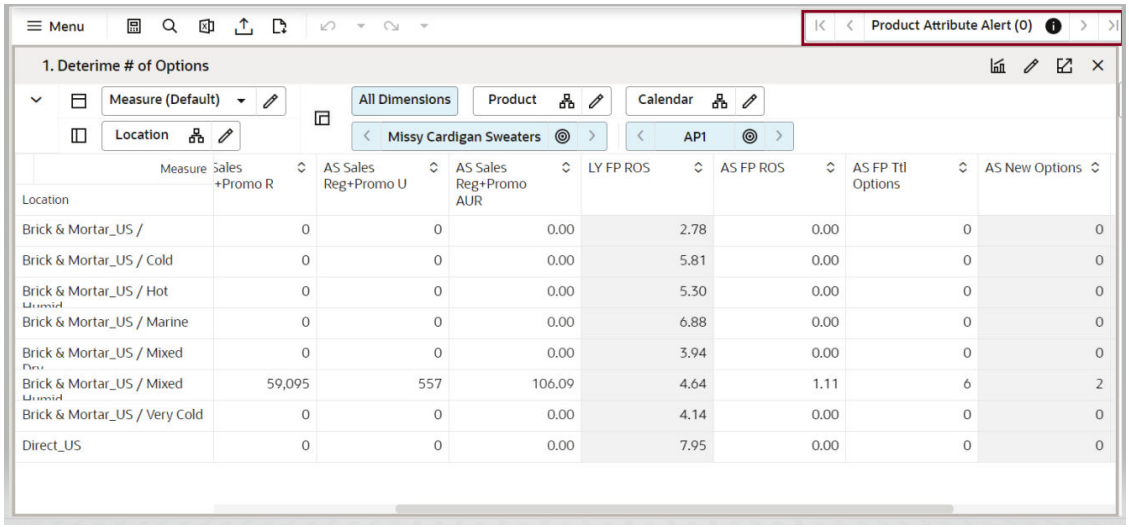
Sell Thru Warning

This alert activates to green when WP Sell Thru % is higher than the planner-entered TGT Sell Thru % and activates to yellow when the WP Sell Thru % is lower than the TGT Sell Thru % for an item/cluster/week. This alert is used in the Item Planning and In-season Planning segment.

Alert Navigation

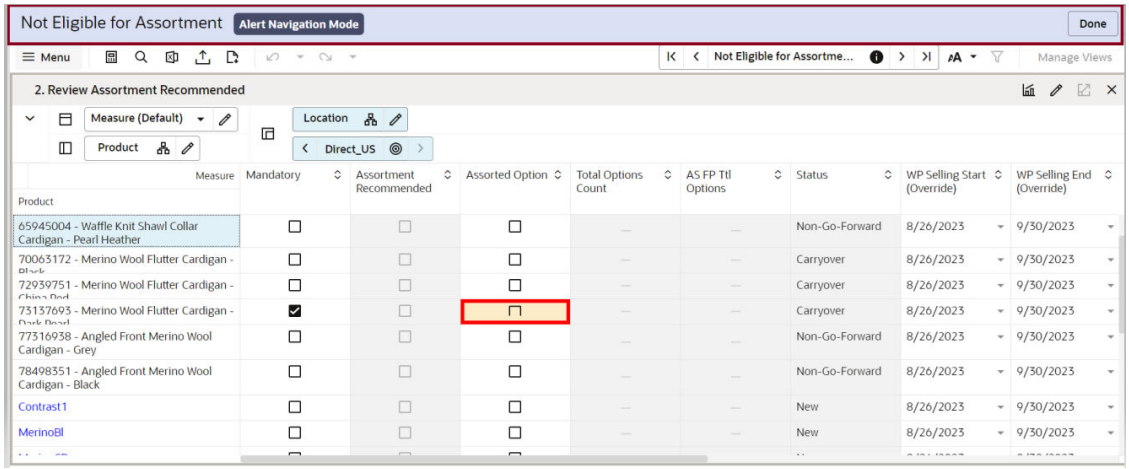
Click the right arrow to launch the Alert Navigation mode. Use Alert Navigation mode to navigate quickly between the alerts that are present in the specified view.

Figure A-1 Alert Navigation



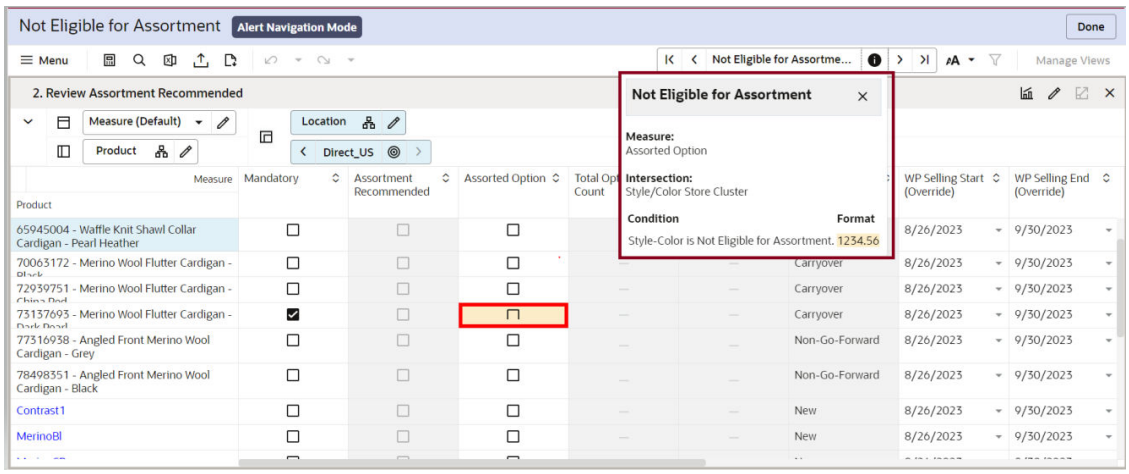
The following figure highlights the Alert Navigation mode.

Figure A-2 Alert Navigation Mode



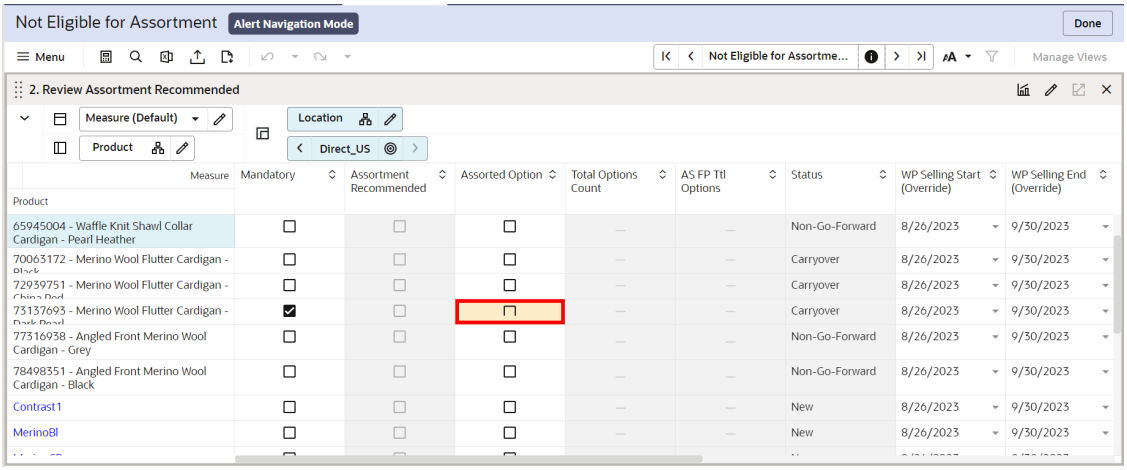
Sometimes, a warning message indicates that the alert hits are invisible. You can check the alert summary to view the alert intersection and make sure that your view reflects the same intersection so that the alerted positions can be highlighted.

Figure A-3 Alert Intersections



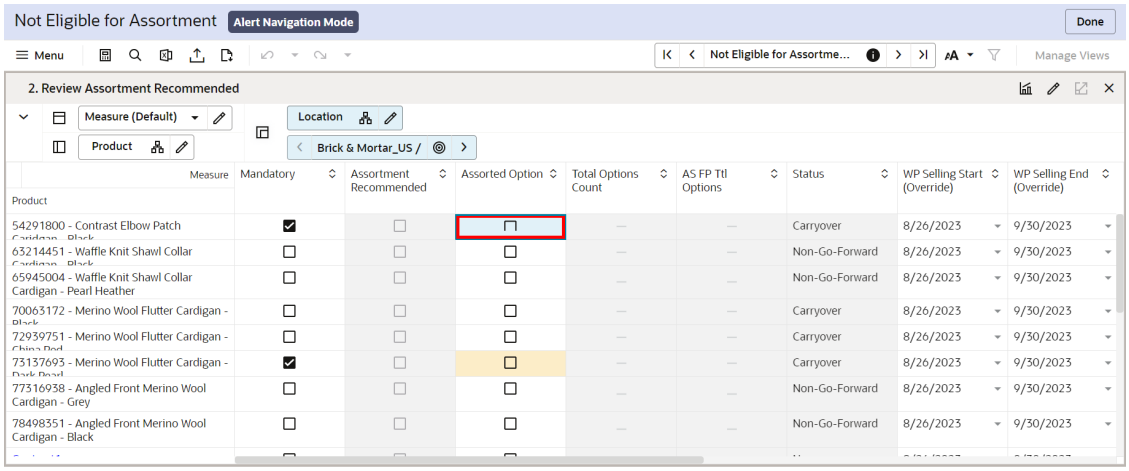
Once the alerted intersections are highlighted at the required intersections as specified in the alert summary, you can resolve them one by one.

Figure A-4 Alert Position



Click **Next** to move to the next selected alert until you resolve all the alerted positions. You can also exit from the Alert Navigation mode. Click the left or right arrows to move to the next or previous real time alert relative to the currently selected cell in the pivot table.

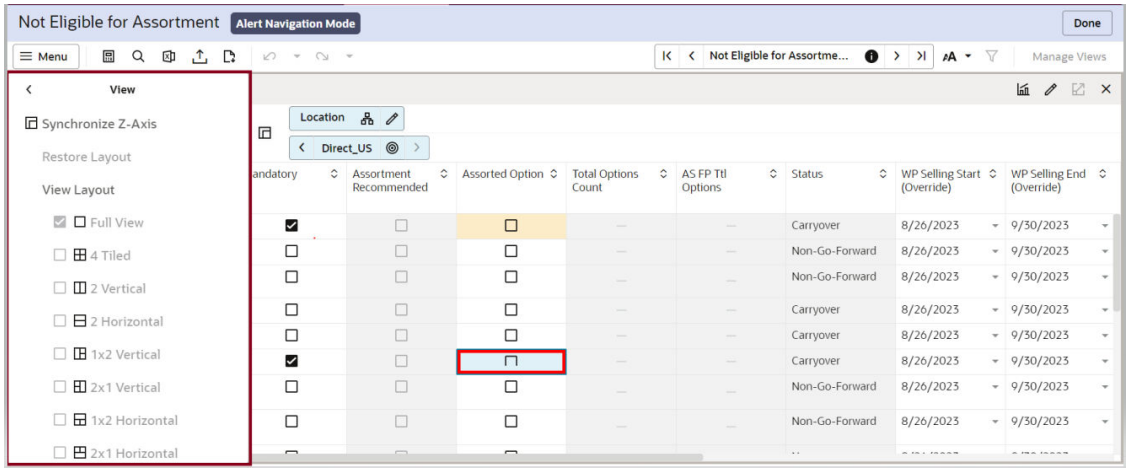
Figure A-5 Moving Between Alerts



In Alert Navigation mode, the rows, columns, and pages in the workspace view are restricted to those with the currently selected real time alert. These rows are not dynamically updated. The same rows, columns, and pages remain visible after a calculation changes the data.

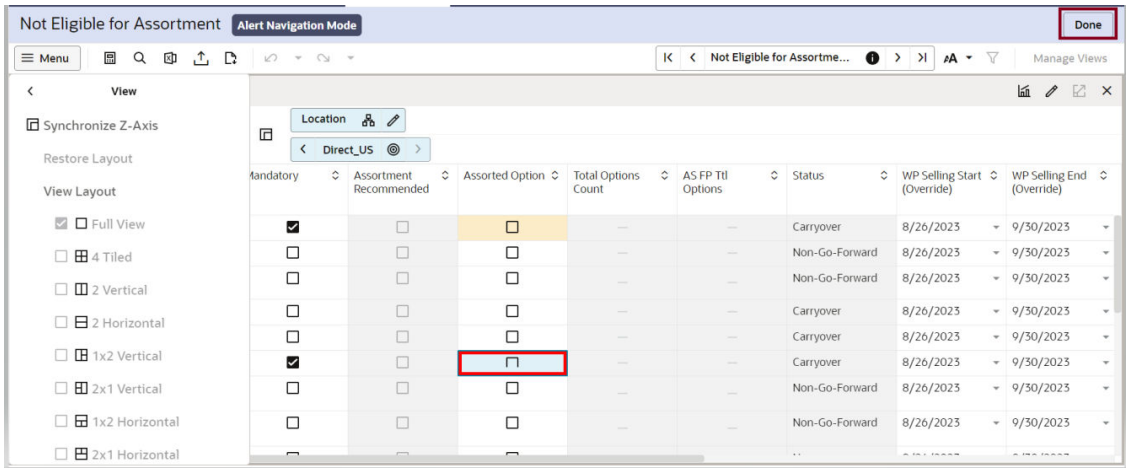
You cannot change the view layout or navigate to a different view in the Alert Navigation mode.

Figure A-6 View Layout



You can exit the Alert Navigation mode by clicking **Done**. To hide the alerts, deselect the Alert in the Exception list.

Figure A-7 Exit Alert Navigation Mode



Special Filters

Special Filters are used to affect the visible positions in the workspace view. These filters contain special rules, so you can focus dynamically on the information that is important to them. Hovering over a Special Filter displays information about the filter criteria.

Once the Special Filter is applied, the positions that do not match the criteria are hidden. You can verify positions using EVO to view the positions in the hidden area. Any positions that were manually hidden previously will be un-hidden if they match the Special Filter criteria.

Following are the special filters defined in the application through configuration.

Warehouse Mapping

The Special Filter can be activated to show only the warehouse locations in the view. This is used in the Warehouse Mapping view of the Planning Administration segment under the Planning Administration activity.

Filter Weeks by Assortment Period

The Special Filter can be activated to show only the weeks associated with the Assortment Period in the view. This is used in the Curves by Assortment view of the Curve Maintenance segment under the Planning Maintenance activity.

Last Year Filter Attribute Values

The Special Filter can be activated to show only the data associated with the attribute values for the Last Year Period in the view. This is used in the Review History by Attributes view in the Assortment Planning segments under the Planning Services activity.

Last Season Filter Attribute Values

The Special Filter can be activated to show only the data associated with the Attribute values for the Last Assortment Period in the view. This is used in the Review History by Attributes view in the Assortment Planning segments under the Planning Services activity.

Filter by Selected Options

The Special Filter can be activated to show only the Assorted Options from the available options list. This is used in the Assortment Planning segment under the Planning Services activity.

Filter by Carryover Options

The Special Filter can be activated to show only the Carryover options associated with the Assorted Options.

Filter by New Options

The Special Filter can be activated to show only the New options associated with the Assorted Options.

Filter by New/Carryover Options

The Special Filter can be activated to show only the New/Carryover options associated with the Assorted Options.

Filter by Assorted

The Special Filter can be activated to show only the Assorted options associated with the recommend assortment step. This is used in the Plan Buy Quantity, Define Parameters, Reconcile to Assortment Plan, Inventory Parameters, and Receipts by Size views in the Plan Assortment, and Item Planning under the Planning Services activity.

Filter by Visual Assortment

The Special Filter can be activated to show only the Visual Assortment with the assorted options. This is used in the Time-Phased Visual Assortment view in the Assortment Planning segment under the Planning Services activity.

Filter on by Selected

The Special Filter can be activated to show only the selected options associated with the plan. This is used in the Trend Analysis view of the Item Planning segment under the Planning Services activity.

Filter by Add/Drop

The Special Filter can be activated to show only the options associated with the Add or Drop status in the plan. This is used in the Define Parameters view of the In-season Item Planning segment under the Planning Services activity.

Filter by Selected Criteria

The Special Filter can be activated to show only the options associated with the Selected Criteria of the plan. This is used in the Plan Receipts & Inventory and Plan Sales & Margin views of the In-season Item Planning under the Planning Services activity.

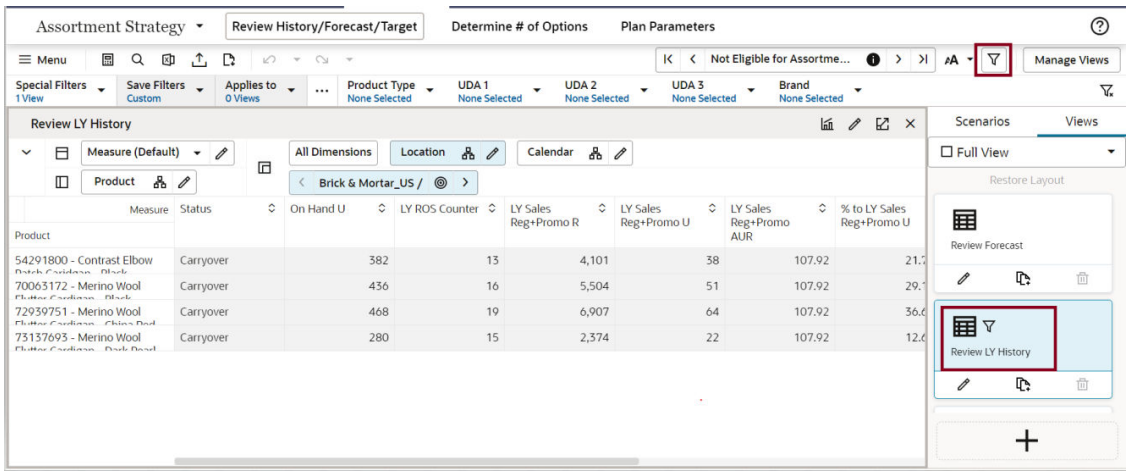
Filter by Keep/Add

The Special Filter can be activated to show only the options associated with the Add or Keep status in the plan. This is used in the Inventory Parameters view of the In-season Item Planning segment under the Planning Services activity.

Special Filters Navigation

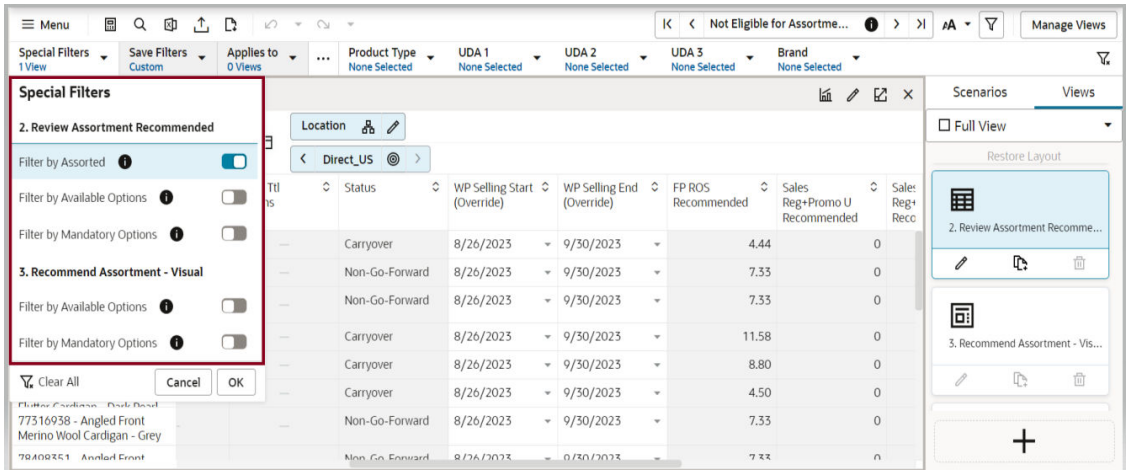
When the Special Filter exists, the Special Filter icon on the Quick Access Toolbar appears highlighted and is applied to the view in the view management drawer.

Figure A-8 Special Filter Navigation Icon



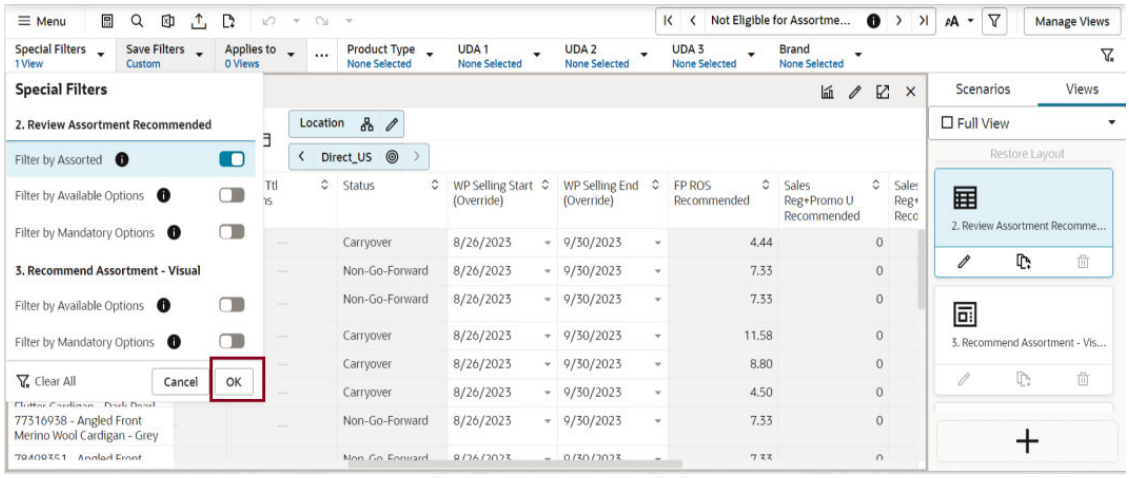
You can select the views that the selected Special Filter must apply to, either one view, multiple views, or all views under the step. Special Filters that have the same measure and query level combination are represented as one option and are applied to multiple views in a step.

Figure A-9 Special Filter Navigation: Select Views



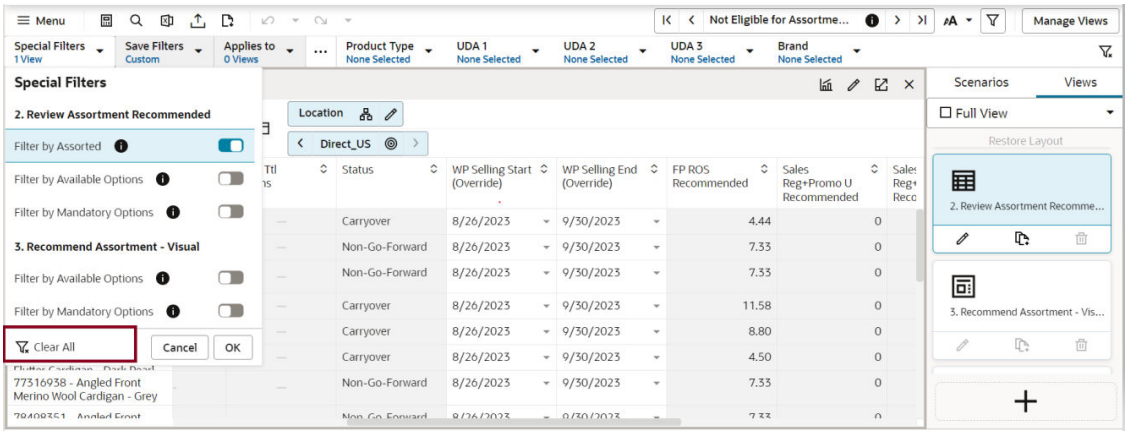
You can select the views that the selected Special Filter must apply to, either one view, multiple views, or all views under the step.

Figure A-10 Select to Apply Special Filter



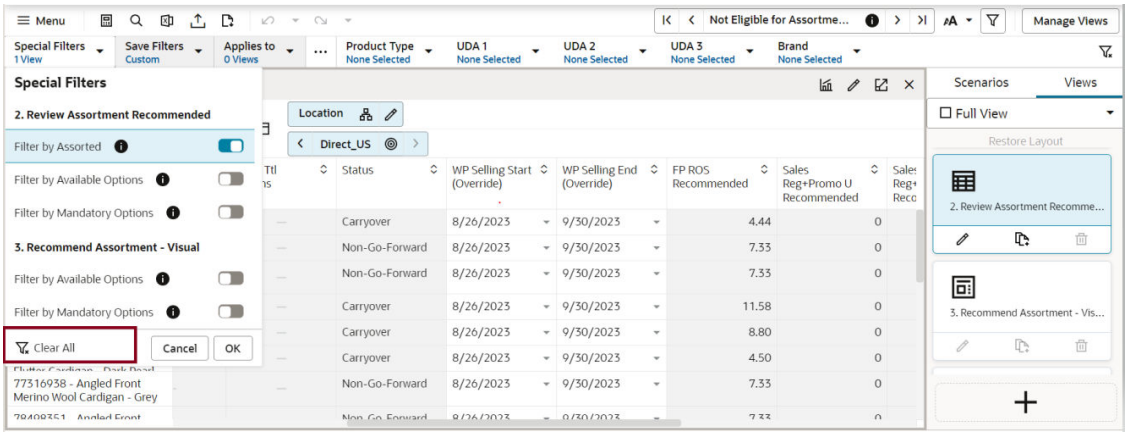
You can clear all the Special filters applied by clicking the special filters LOV, clicking **Clear Filters**, and clicking **OK**.

Figure A-11 Clear Special Filters



You can clear all the Special filters applied by clicking the special filters LOV, clicking **Clear All**, and clicking **OK**.

Figure A-12 Special Filter: Clear All Filters



Reclassification

Reclassification is the process of moving the item from one group to other for various business-driven processes. During the reclassification process in Assortment and Item planning, there is no impact to the clusters and their definitions. As and when items move from one department to another or one class to another, the plans of that department /class will change owing to the movement of the item. It is always advisable to reclassify an item at a logical stage where the impacts on future plans are minimal.

B
Appendix: Troubleshooting

This appendix provides details that you can use to identify and resolve problems.

Accessing Multiple RPASCE Applications

You may need to access multiple RPASCE applications, such as MFPCS, APCS, and IPOCS-Demand Forecasting, at the same time. In this case it is necessary to launch each application URL in a separate browser window, in the following way.

Launch one application in a browser window, then launch every other application in an incognito window (Chrome) or in a private window (Firefox). Launching multiple applications using regular browser windows of the same type (for example, Chrome/Firefox) can lead to unexpected UI errors, such as logging out of one application that causes a log out across all applications.