Retek® Assort 10.0

User Guide

Retek

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When contacting Customer Support, please provide:

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

Contents

Chapter 1 – Introduction

Assort™ is a tool that helps you react quickly to customer needs and plan assortments that meet the demands of a changing marketplace. With Assort, you easily combine the reality of space availability, fixture capacity and packaging criteria with target data from financial plans or key item plans.

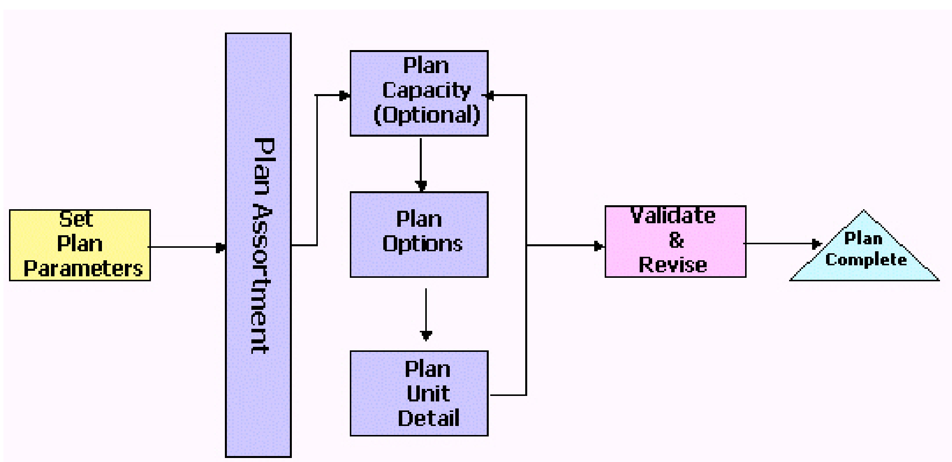
By introducing a consistent process for this purpose, planners, buyers and analysts can review and/or participate in the development of the optimal mix of merchandise to achieve corporate goals for sales, turn and margin. The result is a living and breathing plan that becomes more refined as the process of product selection is finalized.

Assort facilitates knowledgeable buying decisions to provide the right product, at the right place, at the right time. This increased efficiency in assortment planning will serve to strengthen customer loyalty, improve bottom lines and maximize profits.

Assort is a product of Retek Inc.'s Supply Chain Management Solutions, which help you plan at all levels – from marketing and financial plans to specific assortment and key item plans.

Assort business process

Retek's Assortment Planning involves the following business process steps.



Assort business process

The following tasks are accomplished in each step of the business process.

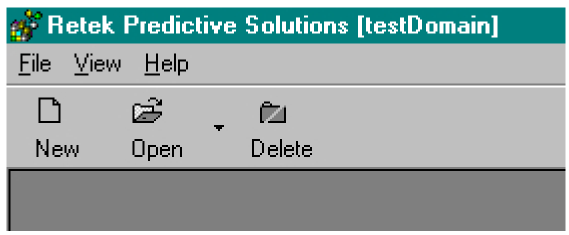
Process Step	Workflow Tab	Worksheet	Task
1. Set Plan Parameters	Create Assortment Plan Plan Information	Wizards Store Grade Percent and Index Plan Information Event Diary	• Create plan framework. • Adjust indexes and store counts by grade. • Update plan information. • Enter diary notes.
2. Plan Capacity (optional)	Project Capacity	Project Capacity	• Select fixtures to be planned from fixture hierarchy. • Plan fixtures by each grade. • Review per store and all store capacity.
3. Plan Options	Plan Options	Plan Unit and Value Options Plan Optimal # of Items	• Enter target information. • Enter number of desired options for each grade.
4. Plan Unit Detail	Plan Item Across Grade	Plan Item Distribution Plan Item Across Grade	• Select merchandise from the product hierarchy. • Determine the quantity for each option. • Adjust suggested by grade option plan.
	Plan Item Detail	Placeholder Description Plan Item Information	• Enter placeholder details. • Enter pricing and pack information for each item.

Process Step	Workflow Tab	Worksheet	Task
	Plan Colors	Color Selection Color Distribution	• Select colors for each option. • Enter the percent contribution or ratio each color represents to the option.
	Plan Sizes	Size Selection Size Distribution	• Select sizes for each option. • Enter the percent contribution or ratio each size represents to the option.

Process Step	Workflow Tab	Worksheet	Task
5. Validate and Revise	Details	Status Plan Detail Color/Size Distribution	• Calculate adjustments made to the plan thus far. • Deselect items by store grade. • Review the percent distribution of colors to sizes by item.
	Plan Totals	Plan Totals Plan vs. Targets	• Review Color/Size details at the All Store level. • Review Final Plan variance to target information.

Chapter 2 – Getting started / navigating the main menu

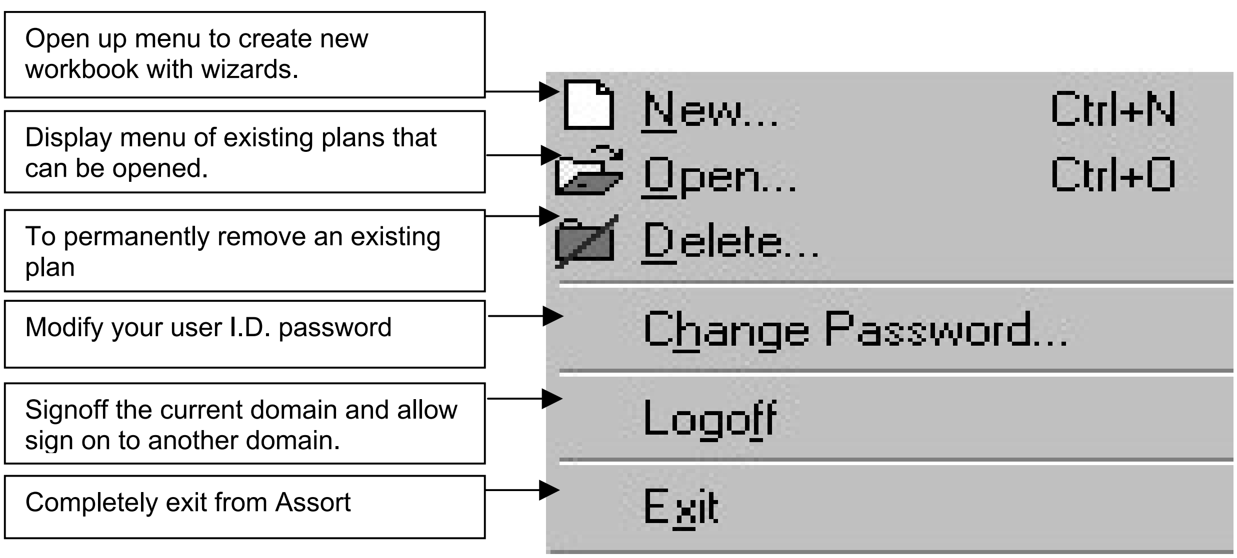
When you log in as an Assort user, a window is displayed with the following menu bar and toolbar. Following is a brief description of the menu options you need to use to get started using Assort. More details on all the menu options and toolbar buttons are in the online help accessible from the Help menu, and in the Retek Predictive Application Server User Guide.



Assort main menu and toolbar – no workbooks open

The File menu

You use the options on the File menu to begin creating assortment plans. The File menu contains the following options:



File Menu Dialog Box

The New, Open, and Delete options

Choosing New from the File menu, or clicking **New** displays a dialog box showing three options. These options launch wizards for creating assortment plans, editing assortment plans, and generating assortment plan reports.

- The Assortment Plan Report wizard asks you questions used to build reports. (See Chapter 9 for more details on reports.)

- The Create Assortment Plan wizard asks you questions that define parameters of a plan, such as product hierarchy or phase. When the wizard is completed, Assort proceeds to the steps in the planning process.

- The Edit Assortment Plan wizard allows you to edit an existing assortment plan. The wizard asks you to select a product category and a date range. The wizard produces all the assortment plans that meet the selected criteria, from which you select the assortment plan you want to edit.

Choosing Open from the File menu, or clicking **Open** displays a window that lists all the plans and reports previously created. You select plan or report to read or edit.

Choosing Open from the File menu, or clicking **Delete** displays a window that lists all the plans and reports previously created. You select a plan or report for deletion.

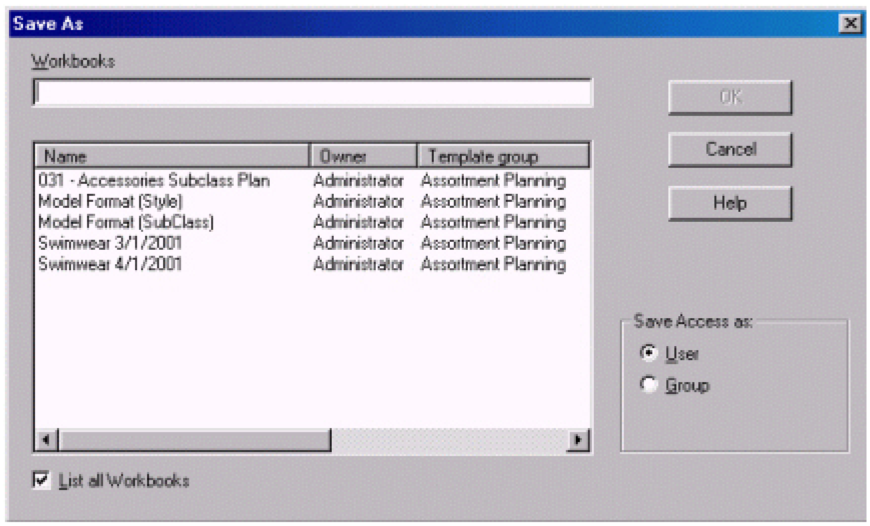
Note: See Assort toolbar buttons and workflow tabs in Chapter 3 for more details on all menu options.

Save, close, and open a plan

You can save a newly created plan at any point in the planning process and open it later to complete the planning process or edit previous steps. This action also allows the flexibility to continuously revise your plan as new information comes in.

Save the plan information

1 To save the plan information generated by the wizard, select File > Save from the menu bar. The Save As window is displayed.



Save As window for Assortment Plans

The column fields in the list box describe existing plans:

- Name: Name of plan
- Owner: Plan originator or Group originator
- Template Group: Assortment Planning or Assortment Plan Report
- User Group: Work group of the plan originator
- Type: Type of plan or report
- Date: Date of origination
- Access: States individual (originator) or group access

The Save As window displays previously entered plans or reports. The first field is blank. When you enter a name for this plan, it will be displayed in the list of assortment plans that can be viewed or edited. This plan name is displayed on the Assort title line when the assortment plan is open for further build or editing procedures.

2 Enter an identifying name in the top Workbooks field.

3 In the Save Access As section, select User or Group. Selecting Group allows other users within your group to view/edit your plan. Selecting User allows only the plan originator to view or edit this plan. Once selected, it cannot be changed.

4 If you want all workbooks from your group to be displayed for viewing or editing, select the List All Workbooks check box. If this check box is cleared, you will only see the workbooks created by you as Owner.

5 Click **OK**. The parameters of this plan have been saved and the plan structure is available for continued planning or for access at another time. The Step 1 window is still displayed.

Saving options

When you save plan information, you are presented with a dialog that lists the following options:

Option	Description
Save	Saves all information in the plan, including the current layout of worksheets within the steps. This has the same result as selecting File > Save, or clicking **Save** on this toolbar. If the current plan has been previously saved, then **Save** updates the stored information. If the plan has not been previously saved, **Save** displays the Save As window, in which you specify a plan name. **Save** does not commit changes to the master database.
Commit Now	Commits the current state of data in your plan to the master database. This option has the same result as selecting File > Commit Now. If changes have been made in the plan since the last save, you will be asked whether or not you want to save the plan before committing your data.
Save and Commit Now	Saves the plan and immediately commits the data to the master database. Plan information may be available for other planners.
Save and Commit Later	Saves the plan immediately. Later, the plan is committed to the master database during a batch process, when system utilization is minimized.
Ignore Changes	Exits Assort without saving changes made since the previous save. Information is not committed to the database.
Cancel	Closes the dialog that displays the saving options without further action.

Open an existing plan

1 From the Menu Bar, select File > Open or click **Open** on the toolbar. A list of existing plans is displayed.

2 Highlight the name of the plan you wish to edit.

3 Click **OK**. The last visible window when you saved the plan is displayed. Use the next or previous arrows to navigate through the plan windows as you edit.

Delete a plan

1 On the toolbar, click **Delete**, or choose File > Delete from the main menu. The Delete window is displayed, showing a list of plans.

2 Click on the title of the plan you wish to delete. The plan title is highlighted.

3 Click **OK**. A dialog window is displayed which asks you to confirm your decision.

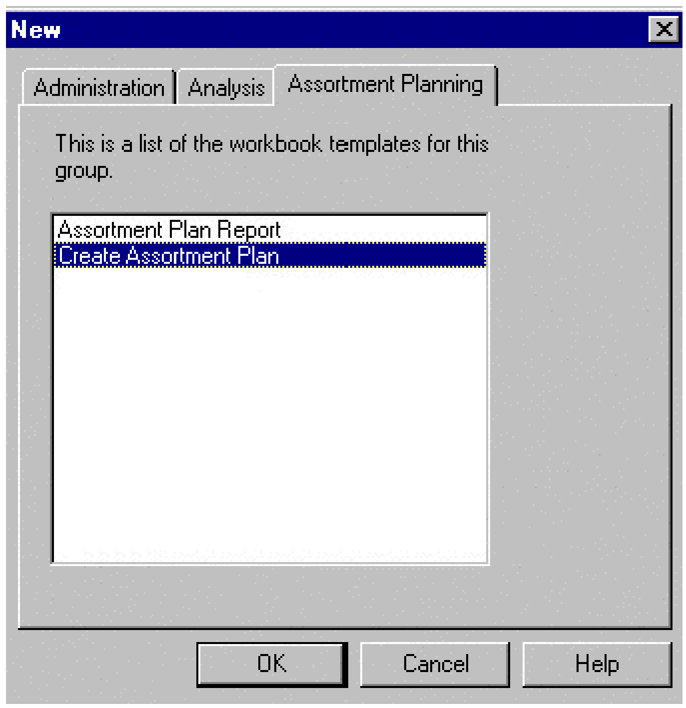
4 Click **OK** to delete the plan, or click **Cancel** to abort the process.

Chapter 3 – Set plan parameters

The Create Assortment Plan wizard asks you questions that define parameters of a plan, such as product hierarchy or phase. This step involves creating the initial assortment plan and adding plan information.

Create assortment plan framework

1 On the Assort menu bar, select File > New or click **New** on the toolbar. The New window is displayed.



New Workbook dialog for Assort

2 On the Assortment Planning tab, select Create Assortment Plan and click **OK**. The Create Assortment Plan Wizard is displayed. In the Create Plan Assortment Plan Wizard, you will enter several important plan parameters that will be outlined in more detail:

- Set up the product hierarchy level and plan phase
- Establish the store grade distribution
- Establish plan business measure and capacity

Create Assortment Plan Wizard buttons

The Create Assortment Plan Wizard has several buttons for navigating the wizard windows.

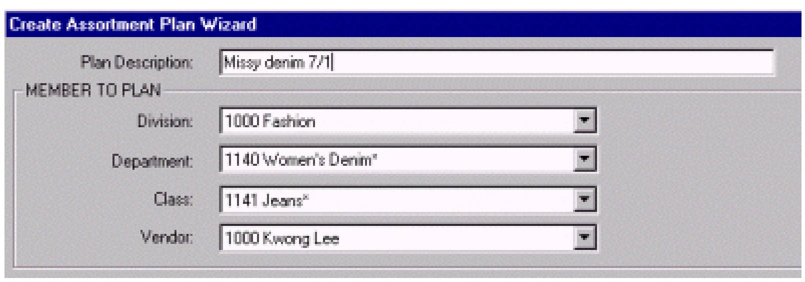
Button Name	Button Description
Cancel	Exits the window without saving changes or entries.
Help	Displays a list of help topics available in Assort.
<Back	Returns to the previous wizard question or window.
>Next	Accepts the entry and moves to the next question or window.
Finish	Completes the wizard entries and builds the windows for the planning steps.

Create Plan Framework

1 On the first page of the Create Assortment Plan wizard, select the lowest product level at which to plan.

2 On the next page, select the highest product level at which to plan. The lowest and highest product levels selected determine the range of hierarchy levels in your assortment plan.

3 Click **Next**. The main Create Assortment Plan wizard window is displayed.

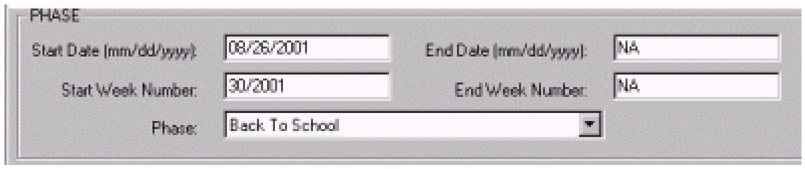


Create Assortment Plan Wizard – Plan identification fields

4 In the Plan Description field, enter a description for the plan.

5 The next entries define the product hierarchy Member To Plan. The number of fields displayed is a result of the product hierarchy (plan level) chosen in the previous window. If you have used Assort previously, the system defaults to your previous entries. These entries can be changed.

In addition, you have the option of planning styles by vendor. This option is not available at any other level of planning other than when using “style” as the lowest level to be planned.



Create Assortment Plan Wizard – Phase fields

6 Enter the Start Date. The corresponding Start Week Number will automatically fill in. If a Start Date is entered that does not fall on a Sunday, the system will default to that particular weeks actual Start Date.

The End Date is not required but may be entered if desired. Once entered, the system will default to that particular weeks actual End Date number.

Choose the phase the plan represents using the drop down list of phase options. These phases are determined at implementation or as the User names custom phases later in the planning process..

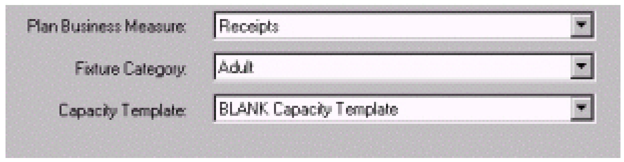
Create Assortment Plan Wizard – Store Grade Distribution fields

7 In the Store Grade Distribution box of the Create Assortment Plan Wizard, select a store distribution category from the % of Stores drop-down list. You may choose to modify this distribution as you proceed through the plan.

8 Enter the Total Number of Stores to be included in this plan.

9 Select the Store Grade Index from the drop-down list.

Note: The current store grade index is Custom. You enter the index as you proceed through the plan.



Create Assortment Plan Wizard – business measure, fixture, and capacity fields

10 In the Plan Business Measure field of the Create Assortment Plan Wizard, select Sales, Receipts, or Inventory from the drop-down list. This entry names the source of the target data to be used in the plan.

11 In the Fixture Category field, select the category that provides fixtures suitable for this plan from the drop-down list.

Note: Assortment plans can be completed without the benefit of capacity data. If you wish to build the plan without capacity data, select No Capacity Template from the Fixture Category drop-down list.

12 In the Capacity Template field, select one of the templates or choose Blank Capacity Template from the drop-down list. If the assortment plan will not be utilizing capacity data, select No Capacity Template.

13 On the next wizard page, select the Upper Limit on the Number of Placeholder Items that will be included in the assortment plan.

14 On the next wizard page, select whether the inner pack is honored.

- If you select No, on the next wizard page the system will ask you to select the operating mode when planning colors and sizes over grades. You may choose to either always hold the plan constant, or revise the plan based on color/size across grade planning.
- If you select Yes and the inner pack is honored, the system will remind you that honoring the inner pack requires the plan to be revised to conform to the pack size. The system will reconfigure units to best utilize the inner pack constraints.

Note Your answers to the questions on these pages are saved from the first time you use the Create Assortment Plan wizard. On subsequent uses of the wizard, you can skip these pages by selecting Next if the selected values are sufficient.

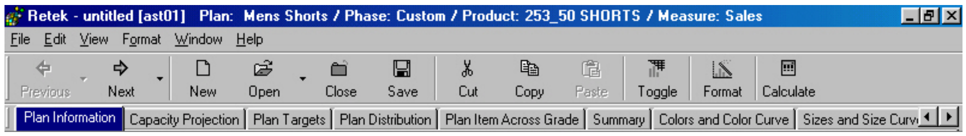
15 Click **Finish**.

Assort builds the additional entry windows from the Assortment Plan Wizard data you have entered. (This process may take several minutes).

In addition, an expanded Assort toolbar is displayed as well as workflow tabs to take you through the assortment planning process. The workflow tabs are used in order from left to right as you create the assortment plan.

Assort toolbar buttons and workflow tabs

Now that a workbook has been created, Assort displays an expanded toolbar and workflow tabs for navigating through the assortment plan:



Assort toolbar and workflow tabs

Toolbar buttons

Following are brief descriptions of the Assort toolbar buttons. For more detailed descriptions, see the Retek Predictive Application Server User Guide or online help.

Button Name	Button Description
Previous	Navigates to the previous step in the business process. Each distinct step is associated with a separate worksheet or set of worksheets. Clicking this toolbar button produces the same result as choosing View > Previous in Flow Control. The steps in the business process are represented by the flow control tabs, which normally appear immediately beneath the application toolbar. To view the worksheet(s) associated with a particular step, you can simply click on the corresponding tab. For more information, see “Assort process steps workflow tabs” on page 18.
Next	Navigates to the next step in the business process. Each distinct step is associated with a separate worksheet or set of worksheets. Clicking this toolbar button produces the same result as choosing View > Next in Flow Control. The steps in the business process are represented by the flow control tabs, which normally appear immediately beneath the application toolbar. To view the worksheet(s) associated with a particular step, you can simply click on the corresponding tab. For more information, see “Assort process steps workflow tabs” on page 18.
New	Activates the Assortment Plan or Assortment Plan Report wizards.
Open	Opens a list of plans or reports for editing or viewing.

Button Name	Button Description
Close	Closes a set of plans or reports. There are a number of options for saving changes before closing. See “Saving options” on page 9 for more details.
Save	Saves all information in the plan, including the current layout of windows within the steps. This has the same result as selecting File > Save or clicking **Save** on the toolbar. See “Saving options” on page 9 for more details.
Cut	Copies selected worksheet data to an application clipboard and clears the data from the worksheet cells. Same action as choosing Edit > Cut. Only data from write able measures can be cut.
Copy	Copies data at base level.
Paste	Transfers data from the application clipboard to the cursor location. Multiple measure cut/copy in outline mode only supports read/write cells.
Toggle	Display changes from grid view to graph (chart) view.
Format	Allows you to customize the grid or chart view of planning data.
Calculate	Reads recent entries and applies the entries across all calculations. **Note:** Assort calculates automatically when the active window is changed. In addition, deferred calculations can be undone by selecting Edit from the menu, then selecting Remove Last or Remove All Deferred Calculations.

Menu options

The main menu options are described in detail in the online help accessible from the Help menu when running Assort, and in the Retek Predictive Application Server User Guide.

Assort process steps workflow tabs

The Assort workflow tabs are below the Assort toolbar and are used to move between sets of windows displaying aspects of an assortment plan. You can either click on the workflow tabs, or use **Next** and **Previous** toolbar to move between them. The workflow tabs for Assort are as follows:

Process Step	Tab Descriptions
Plan Information	The Plan Information tab provides worksheets for adding and editing plan information, entering store grade percent and index and making entries in the planning diary.
Project Capacity	The Project Capacity tab provides a view to the capacity template, add fixtures, and enter quantities for each fixture. This step is optional.
Plan Options	The Plan Options tab provides worksheets for entering retail and unit targets. In addition, the optimal number of items is planned with consideration to the target and fixture capacity boundaries applied in the previous steps.
Plan Unit Detail	This step is separated into four separate workflow tabs. The Plan Item Across Grade tab provides worksheets for product selection, high level quantity setting, and the spread of those high level quantities to the individual store grades. The Plan Item Details tab provides several worksheets for adding descriptive details about the items in the plan. The Plan Colors tab provides the worksheets for color selection and ranking. The Plan Sizes tab provides the worksheets for size selection and ranking. .
Validate and Revise	The validate and revise process step is supported through two workflow tabs. The first tad is the Details tab which displays the plan totals and plan details, where the planned number of units for each SKU across all grades is made visible. The Plan Totals tab provides a view of color/size distribution and the final plan variance to target information.

Plan Information workflow tab

Now that the assortment plan framework has been created, you can add plan information to it. The worksheets in this step display the parameters that were entered through the Create Assortment Plan wizard. Three worksheets for beginning an assortment plan are displayed: Store Grade Percent and Index, Plan Information, and Event Diary.

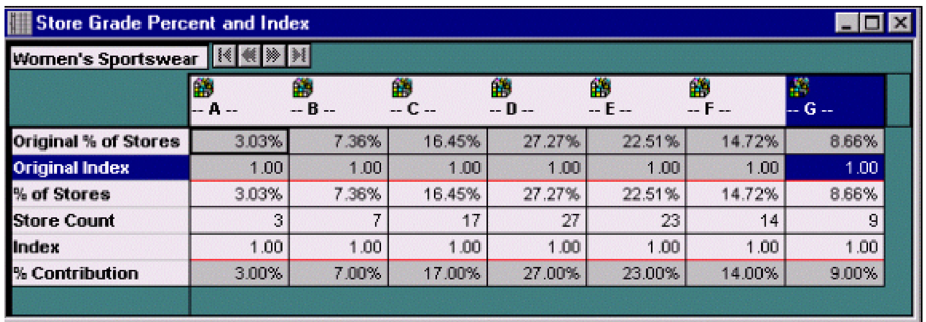
Store Grade Percent and Index Worksheet procedures

In the Store Grade Percent and Index worksheet, you adjust store grades and/or indexes.

Adjust store grades or indexes

1 Click on the Store Grade Percent and Index worksheet. The Store Grade Percent and Index Worksheet is displayed.

Note: some of the measure fields are colored differently. This indicates the *read-only* fields from those that are editable. Descriptions of the worksheet fields follow this procedure.



	-- A --	-- B --	-- C --	-- D --	-- E --	-- F --	-- G --
Original % of Stores	3.03%	7.36%	16.45%	27.27%	22.51%	14.72%	8.66%
Original Index	1.00	1.00	1.00	1.00	1.00	1.00	1.00
% of Stores	3.03%	7.36%	16.45%	27.27%	22.51%	14.72%	8.66%
Store Count	3	7	17	27	23	14	9
Index	1.00	1.00	1.00	1.00	1.00	1.00	1.00
% Contribution	3.00%	7.00%	17.00%	27.00%	23.00%	14.00%	9.00%

Store Grade Percent and Index Worksheet

2 Enter the Index (relationship of each store cluster to the average store specific to your department, class, or subclass) for this Assortment plan. Click **Calculate** to apply.

3 To change the percent of stores by store grade, enter a new percent distribution across grades in the % of Stores field for each store grade. The distribution must equal 100%.

4 Click **Calculate**. This automatically changes the Store Count across grades while hold the total store count constant.

5 To change the Store Count across grades, change any of the entries.

6 Click **Calculate**. This automatically changes the % of Stores by store grade distribution and the total stores count.

Field Descriptions

Store Grade Percent and Index worksheet

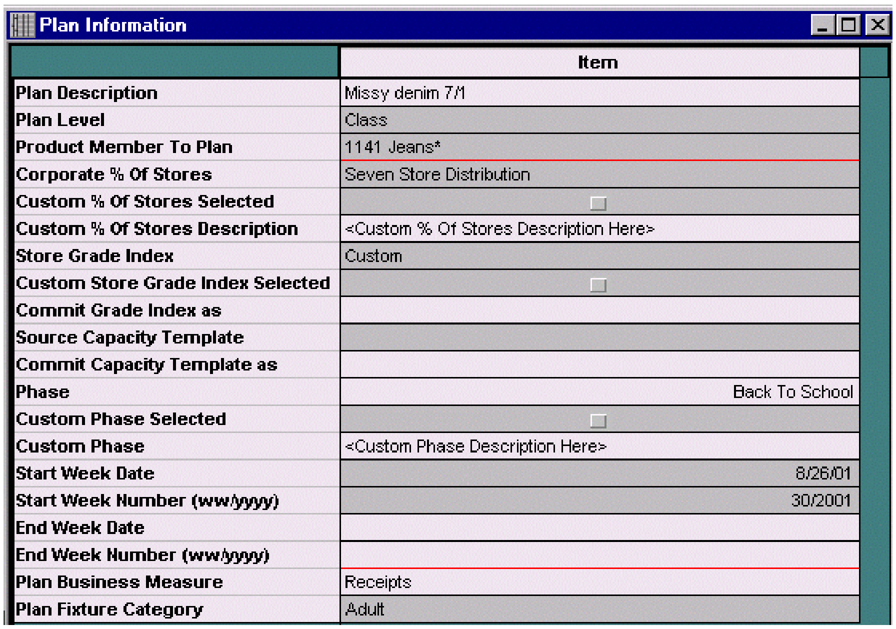
Field Name	Field Description
Original % of Stores	Distribution of total number of stores by store grade selected in Setup step. This field is read-only.
Original Index	A store grade distribution based on the index chosen at set up . The index is a deviation from the average store cluster . This field is read-only.
% Of Stores	A percent of the total number of stores by store grade. This field is editable
Store Count	The total number of stores and distribution by store grade. This field is editable
Index	User-defined custom store grade index.

Plan Information Worksheet procedures

The Plan Information worksheet displays the name of the plan, and the selections made in the previous procedure. Additional entries are optional.

Adjust Plan Information

1 On the Plan Information workflow tab, click on the Plan Information worksheet. Descriptions of the worksheet fields follow this procedure.



	Item
Plan Description	Missy denim 7/1
Plan Level	Class
Product Member To Plan	1141 Jeans*
Corporate % Of Stores	Seven Store Distribution
Custom % Of Stores Selected	
Custom % Of Stores Description	<Custom % Of Stores Description Here>
Store Grade Index	Custom
Custom Store Grade Index Selected	
Commit Grade Index as	
Source Capacity Template	
Commit Capacity Template as	
Phase	Back To School
Custom Phase Selected	
Custom Phase	<Custom Phase Description Here>
Start Week Date	8/26/01
Start Week Number (ww/yyyy)	30/2001
End Week Date	
End Week Number (ww/yyyy)	
Plan Business Measure	Receipts
Plan Fixture Category	Adult

Plan Information Worksheet

2 To add a Custom Store Grade Index, enter a descriptive name in the Commit Grade Index as field. When you move to another entry field, this entry will display in italics.

Note: Italics indicate that a calculation or acceptance of the new entry is pending. This is true in all planning steps.

3 Optional: To save a capacity plan as a template, enter a descriptive name for this new capacity template in the Commit Capacity Template as field. You will build this template in the Project Capacity workflow tab.

4 If you selected Custom Phase in the Create Assortment Plan step, enter a name for the phase in the Custom Phase field.

5 Optional: Specify an End Date. Click the End Week Date line. It is highlighted, and an arrow is displayed in the line. Click the arrow to display a drop-down calendar. Select the End date. The End Week Number will be automatically populated.

Note: If necessary, Plan Description and Plan Business Measure can be changed here.

Field Descriptions

Plan Information Worksheet

Field Name	Field Description
Plan Description	User-defined description, displayed only in the plan.
Plan Level	Product hierarchy member to plan.
Product Member to Plan	Names the product hierarchy.
Corporate % of Stores	A corporate-defined number of stores in each store grade, expressed as a percent.
Custom % of Stores Selected	When a check mark appears in the box , indicates that a Custom % of stores is entered in the Store Grade % and Index worksheet.
Custom % of Stores Description	User-defined name of the custom store grade %.
Store Grade Index	A store grade distribution that contains a sales volume index by store grade. The index is a multiple of the average sales volume.
Custom Store Grade Index Selected	When a check mark is displayed in the box, indicates that a custom index is entered.
Commit Grade Index as	User-defined name of the custom store grade index.
Source Capacity Template	Name of the template chosen when creating the assortment plan.
Commit Capacity Template as	User-defined name of custom template.
Phase	User- defined name of the corporate phase selected.
Custom Phase Selected	When a check mark is displayed in the box, , indicates that a custom phase is named.
Custom Phase	User-defined name for the phase of this plan.
Start Week Date	The first day of the calendar week which starts a phase. This field is editable.

Field Name	Field Description
Start Week Number	A week number from 1-53 and the plan year marking the start of a phase.
End Week Date	The first day of the calendar week which ends a phase. This is optional.
End Week Number	A week number from 1-53 and the plan year marking the end of a phase. The system automatically populates this filed if an End Week Date is selected.
Plan Business Measure	Contains target data that might be sourced from inventory, receipts, or sales from a financial or key item plan. This field is editable. Target data is input manually.
Plan Fixture Category	The fixture category that provides fixtures suitable for this plan.

Event Diary Window procedures

The Event Diary window is a tool that gives you and other users of this plan a place to document plan entries or changes.

Enter Diary Notes

1 Click on the Event Diary window to activate the window.

Event Diary Window

2 Click in the next available Entry row. Type any information that will be helpful in tracking the decision process. The date and your user name are inserted automatically after the window is calculated.

What’s next

All of the entries are complete for Step 1 in the Assortment planning process. If you are planning capacity, proceed to the Project Capacity workflow tab, described in Chapter 4. If you are not planning capacity, proceed to the Plan Options workflow tab, described in Chapter 5.

Chapter 4 – Plan capacity (optional)

Projecting capacity is an optional step in the building of an assortment plan.

Note: The Project Capacity worksheet is not presented if No Capacity Template was selected as a Capacity Template in the Create Assortment Plan wizard process.

The fixtures selected and fixture quantities by store grade define a capacity template. Fixtures are presented with minimum, maximum, and average unit quantities. When the steps in this process are completed, Assort calculates the following values:

- The per-store and all-stores minimum, maximum, and average units
- A per-store and all store maximum number of allowable items

A capacity template can be saved for use in other plans. If a name was entered in the Commit Capacity Template as field on the Plan Information worksheet, this data becomes a template when you commit to the database.

This process step involves the following procedures:

- Display the Project Capacity Worksheet
- Select fixtures to be used from future hierarchy
- Plan number of fixtures by grade
- Review Per Store and All Store Capacity
- Commit a capacity template

Project Capacity workflow tab

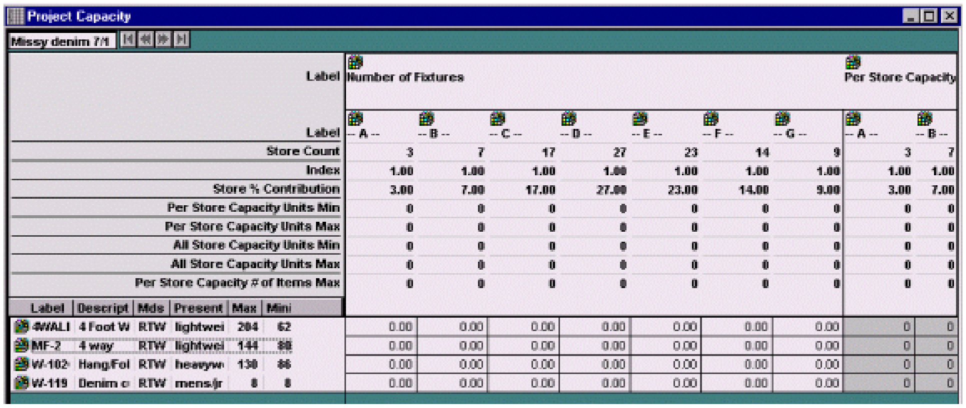
In the Setup step, the capacity template was defined either as a pre-existing template or as a blank template. If a pre-existing template was chosen, a list of fixtures is displayed in the lower left quadrant. If a blank template was chosen, the system defaults to show a single visible fixture.

If the Project Capacity workflow tab is not available, the plan originator did not choose to include capacity in the plan. Proceed to the Plan Options workflow tab, described in Chapter 5.

Project Capacity Worksheet procedures

Display the Project Capacity Worksheet

1 On the Assort workflow tabs, select Project Capacity. The Project Capacity Worksheet is displayed.



Project Capacity Worksheet

Field descriptions

Project Capacity Worksheet

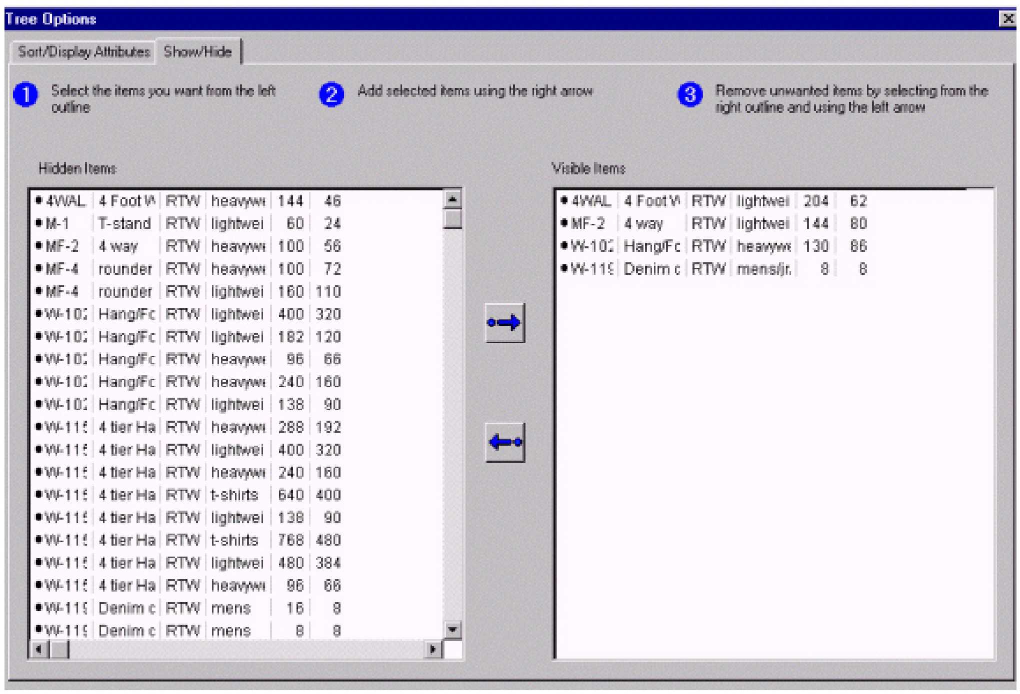
Field Name	Field Description
Label	The store grade label (A, B, C…).
Store Count	The total number of stores and distribution by store grade. This value is either user-entered at the store grade level or computed by the Assort function, using the calculation total number of stores times the percent of stores.
Index	A sales volume index by store grade. The sales volume index is a percent deviation from the average.
Store % Contribution	The percent contribution of the store grade to the organization's overall business.
Per store capacity units minimum	The minimum number of units on a fixture times the number of fixtures in a store grade, summed over all selected fixtures for each grade.
Per store capacity units maximum	The maximum number of units on a fixture times the number of fixtures in a store grade, summed over all selected fixtures for each grade.
All store capacity units minimum	Per-store capacity units minimum times number of stores per grade, summed over all grades.

Field Name	Field Description
All store capacity units maximum	Per-store capacity units maximum times number of stores per grade, summed over all grades.
Per store capacity # of items maximum	The maximum number of items on a fixture times the number of fixtures in a store grade, summed over all selected fixtures for each grade.

Select fixtures to be used from fixture hierarchy

1 Right click on any of the displayed fixtures.

2 Select Show/Hide from the quick menu. The Tree Options dialog is displayed. Select the Show/Hide tab. Two lists are displayed. The Hidden Items list is the source list of fixtures for this plan.



Show/Hide fixtures

3 Click the name of one of the fixtures.

Note: To select several contiguous fixtures for transfer, click the top item and then hold down the Shift key as you click the last item. You can also use the Ctrl key to select non-consecutive fixtures.

4 Click the right arrow to move the highlighted fixtures to the Visible Items list.

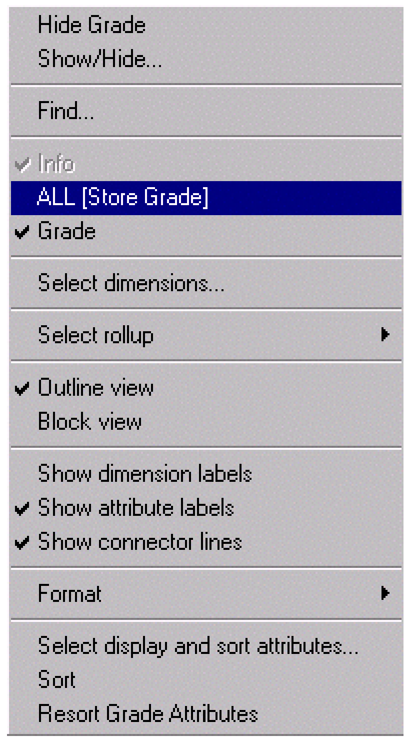
5 Click **OK**. Assort saves the fixture in the list and returns to the Project Capacity worksheet.

Plan number of fixtures by grade

In the section named Number of fixtures, a fixture quantity can be entered in a store grade column, or entered in the all store grade column to propagate across all grades.

1 Enter a quantity in the ALL [Store Grade] column for each fixture. Click Calculate. All store grades are populated with this quantity.

> **Note:** To make the ALL [Store Grade] column visible, move your cursor over any of the store grades. Right-click and select ALL [Store Grade] from the quick menu, as shown below.



Right-Click Quick Menu

2 If the number of fixtures for any one fixture varies across store grade, modify the fixture quantity in the corresponding Store Grade column.

3 Click **Calculate**. Capacity data is calculated.

Review Per Store and All Store Capacity

1 View the capacity data by clicking on the horizontal scroll bar at the bottom of the window. When fixture quantities are entered, all fields display information.

Commit a capacity template

Capacity information is complete for this plan. For a capacity template to be saved for use in other plans, a name must be entered in the Plan Information window under the Plan Information tab – Commit Capacity Template as field. When you commit this plan, the plan data becomes a capacity template.

Chapter 5 – Plan options

There are two purposes for the Plan Options business process step:

- To plan at the store grade level the overall target units and target retail .
- To plan the optimal number of items. In this context, “item” refers to style.

Plan Options workflow tab

This process step is performed on the Plan Options workflow tab.

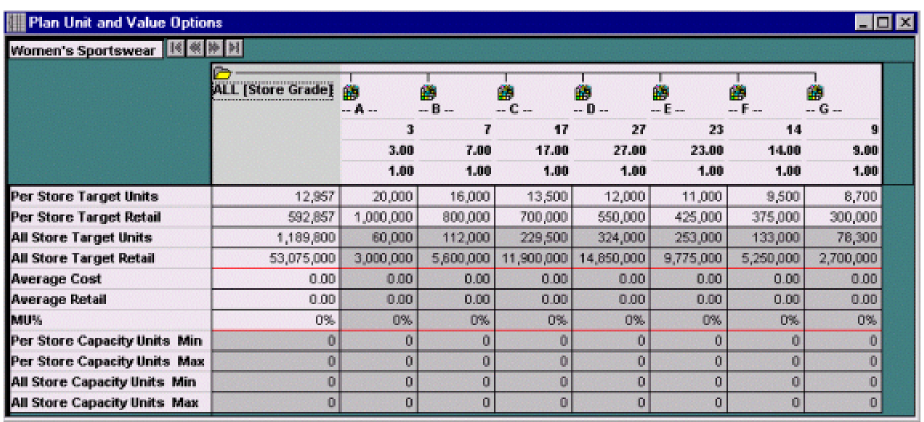
Plan Unit and Value Option Worksheet procedures

The following procedure is performed on the Plan Unit and Value Options Worksheet.

Enter target retail/units

1 On the Plan Options workflow tab, click the Plan Unit and Value Options worksheet to make it active. Descriptions of the worksheet fields follow this procedure.

Here, you plan the overall target units and target retail. These targets will most likely come from a source outside of the Assort application, such as a financial or unit plan.


Plan Unit and Value Options

Women's Sportswear

	ALL [Store Grade]	-- A --	-- B --	-- C --	-- D --	-- E --	-- F --	-- G --
		3	7	17	27	23	14	9
		3.00	7.00	17.00	27.00	23.00	14.00	9.00
		1.00	1.00	1.00	1.00	1.00	1.00	1.00
Per Store Target Units	12,957	20,000	16,000	13,500	12,000	11,000	9,500	8,700
Per Store Target Retail	592,857	1,000,000	800,000	700,000	550,000	425,000	375,000	300,000
All Store Target Units	1,189,800	60,000	112,000	229,500	324,000	253,000	133,000	78,300
All Store Target Retail	53,075,000	3,000,000	5,600,000	11,900,000	14,850,000	9,775,000	5,250,000	2,700,000
Average Cost	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Average Retail	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MU%	0%	0%	0%	0%	0%	0%	0%	0%
Per Store Capacity Units Min	0	0	0	0	0	0	0	0
Per Store Capacity Units Max	0	0	0	0	0	0	0	0
All Store Capacity Units Min	0	0	0	0	0	0	0	0
All Store Capacity Units Max	0	0	0	0	0	0	0	0

Plan Unit and Value Options Worksheet

Note: If capacity planning was not selected for this plan, then capacity data fields will be empty.

2 Enter the targets, either in retail values or in units. Values can be entered at the All Store or the Per Store Level.

- If the Target Units figure is unknown, enter Target Retail value in the ALL [Store Grade]. Click **Calculate**. Target Retail value data will be displayed across the store grades.

- Enter the Average Retail and Average Cost information. Click **Calculate** to view MU% (mark up percent) and Target Unit data across grades.

- If the Target Units figure is known, enter it in the ALL [Store Grades] column. Click **Calculate**. Values are calculated for all the store grades.

Note: To make the ALL [Store Grade] column visible, move your cursor over any of the store grades. Right-click and select ALL [Store Grade] from the quick menu.

Field descriptions

Plan Unit and Value Options Worksheet

Field Name	Field Description
Per Store Target Units	The target values per store, expressed in units.
Per Store Target Retail	The target values per store, expressed in retail value.
All Store Target Units	Derived from user-defined target retail data divided by the average retail value or user input data from financial or key item data.
All Store Target Retail	User input data from financial or key item plan.
Average Cost	User input from financial or key item plan.
Average Retail	User input from financial or key item plan.
MU%	Markup percent.
Per Store Capacity Units Min	The minimum capacity of units per store.
Per Store Capacity Units Max	The maximum capacity of units per store.
All store Capacity Units Min	The minimum capacity of units for all stores. This field is read-only and is displayed from the capacity projection step.
All store Capacity Units Max	The maximum capacity of units for all stores. This field is read-only and is displayed from the capacity projection step.

Plan Optimal # of Items Worksheet procedures

The following procedure is performed on the Plan Optimal # of Items Worksheet.

Enter units

In this step of the process, data from a financial plan or key item plan and the information from the project capacity step are merged to help you plan the optimal number of items and the optimal units per item.

In the Plan Optimal # of Items worksheet, you enter target data to derive target units and determine the optimal number of units at the store level. As you enter data, considerations might be current fashion direction, market expectations defined by what is selling, and historical data about items which did or did not produce sales in a given store or store grade.

1 Click the Plan Optimal # of Items Worksheet to make it active.

Plan Optimal # of Items

Women's Sportswear

	ALL [Store Grade]						
	-- A --	-- B --	-- C --	-- D --	-- E --	-- F --	-- G --
Fixture Presentation Stds. Met	Y	Y	Y	Y	Y	Y	Y
Per Store Capacity # of Items Min	0	0	0	0	0	0	0
Per Store Capacity # of Items Max	0	0	0	0	0	0	0
Per Store Target # of Items	200	150	130	110	90	70	50
Per Store Target Units/(max) Cap # of Items							
Per Store Target Units/(min) Cap # of Items							
Per Store Target Units per Item	100	107	104	109	122	136	174
All Store Target Units/(max) Cap # of Items							
All Store Target Units/(min) Cap # of Items							

Plan Optimal # of Items Worksheet

2 In the Plan Optimal # of Items Worksheet, enter the Per Store Target # of Items or the Per Store Target Units per Item.

3 Click **Calculate**. Assort divides the Per Store Target Units data by your entries to calculate all optimal item data across grades.

Note: If capacity planning was not selected for this plan, then capacity data fields will be empty.

Chapter 6 – Plan unit detail

At this point in the Assort business process, you are ready to plan your assortment. This step consists of entering, calculating, and reviewing values on the following workflow tabs:

- Plan Item Across Grade
- Plan Item Detail
- Plan Colors
- Plan Sizes

Plan Item Across Grade workflow tab

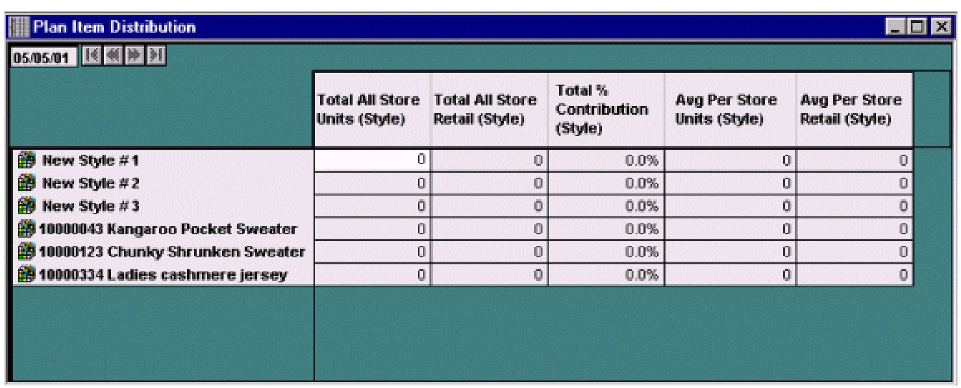
The following procedures are performed on the Plan Item Across Grade workflow tab.

Plan Item Distribution Worksheet procedures (optional)

The following procedures are performed on the Plan Item Distribution Worksheet.

Select the Plan Item Distribution Worksheet

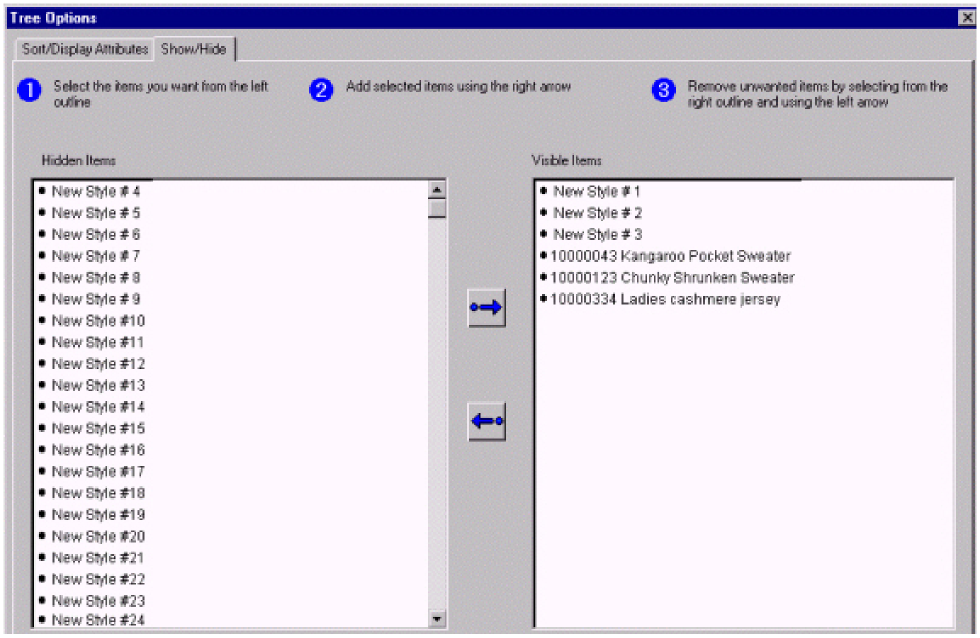
1 On the Plan Item Across Grade workflow tab, select the Plan Item Distribution worksheet.



Plan Item Distribution Worksheet

Select merchandise

1 In the Plan Item Distribution Worksheet, right-click in the Product section and select Show/Hide. The Tree Options dialog is displayed. Select the Show/Hide tab. On this tab, two lists of items are displayed. The Hidden Item list includes all existing items and new placeholder items. Placeholder items are at the beginning of the list.



Show/Hide items

2 To select an item for this assortment, click on the item.

3 Click the right arrow button. The item is moved to the Visible Item list. Click **OK** when all the items are selected.

Determine the level of each style

1 Enter anticipated retail or units by style. This may be done at the Total All Store level or the Average Per Store Level.

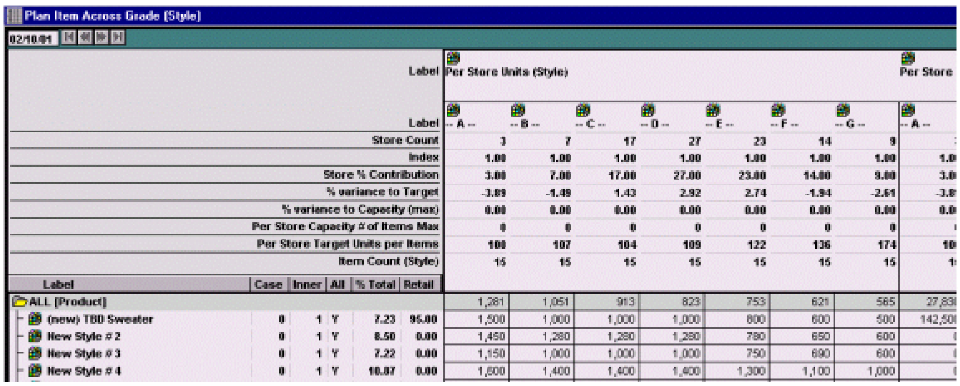
2 Click **Calculate**. Once calculated the total percent contribution by style will appear.

Plan Item Across Grade Worksheet procedures

The following procedures are performed on the Plan Item Across Grade Worksheet.

Select the Plan Item Across Grade Worksheet

1 Click the Plan Item Across Grade worksheet to make it active.



Plan Item Across Grade Worksheet

2 Information from the Plan Item Distribution worksheet will populate data for the item at the grade level for all styles.

Note: To make the ALL [Store Grade] column visible, move your cursor over any of the store grades. Right-click and select ALL [Store Grade] from the quick menu.

3 Review the quantities by grade and by style and make adjustments.

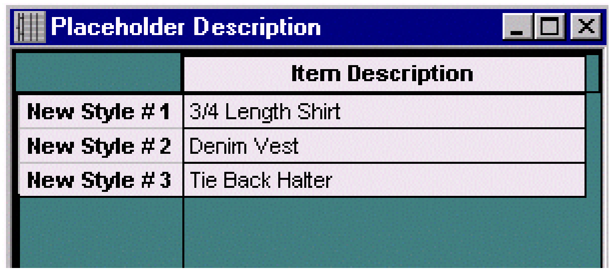
At this time, the units by style by grade are finalized.

Plan Item Detail workflow tab

The following procedure is performed on the Plan Item Detail workflow tab.

Placeholder Description Worksheet procedures (optional)

In the Placeholder Description worksheet, you define the new items that were added to the assortment plan.



Placeholder Description Worksheet

Enter merchandise details

Note: If your assortment does not include new items, skip this procedure.

1 Click the Placeholder Description Worksheet to make it active.

2 Enter the item description for each new item

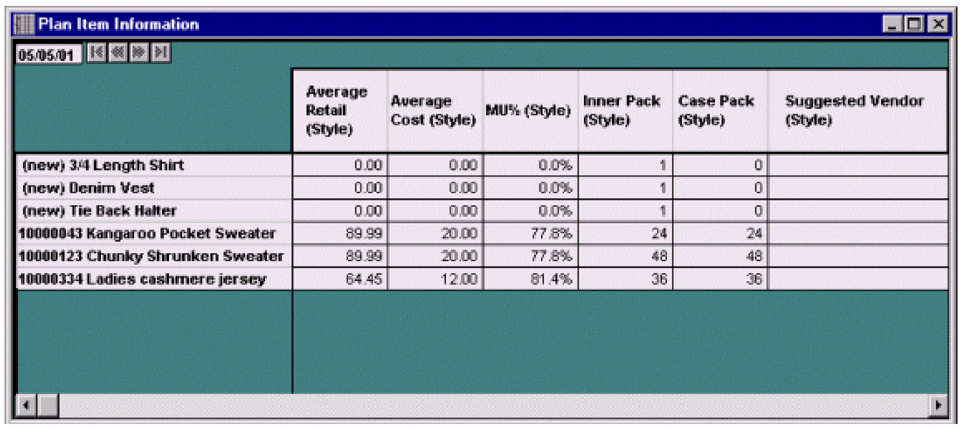
3 Click **Calculate**. The item description is displayed together with the placeholder number in the product hierarchy.

Plan Item Information Worksheet procedures

The following procedure is performed on the Plan Item Information Worksheet.

Enter cost and/or retail price for each item

New item information from the Placeholder Description window will populate the New Style placeholder fields in the Plan Item Information worksheet.



Plan Item Information

05/05/01

	Average Retail (Style)	Average Cost (Style)	MU% (Style)	Inner Pack (Style)	Case Pack (Style)	Suggested Vendor (Style)
(new) 3/4 Length Shirt	0.00	0.00	0.0%	1	0	
(new) Denim Vest	0.00	0.00	0.0%	1	0	
(new) Tie Back Halter	0.00	0.00	0.0%	1	0	
10000043 Kangaroo Pocket Sweater	89.99	20.00	77.8%	24	24	
10000123 Chunky Shrunken Sweater	89.99	20.00	77.8%	48	48	
10000334 Ladies cashmere jersey	64.45	12.00	81.4%	36	36	

Plan Item Information Worksheet

1 Click on the Plan Item Information Worksheet to make it active.

2 Enter the estimated cost and/or estimated retail price for each item in the assortment plan. The markup percent (MU%) will be automatically calculated.

3 Optional: Enter the inner pack size for each item. The Inner Pack field defaults to 1 and must always have a minimum value of 1.

4 Optional: Enter the case pack size for each item.

5 Optional: Enter a Suggested Vendor for each item.

6 Click **Calculate** to apply the newly supplier item detail data to the product hierarchy and for use in future calculations.

Plan Colors workflow tab

This step of the Assort process involves choosing item colors or color families and identifying what percentage of the total item purchase will be a specific color or color family. It is performed on the Plan Colors workflow tab.

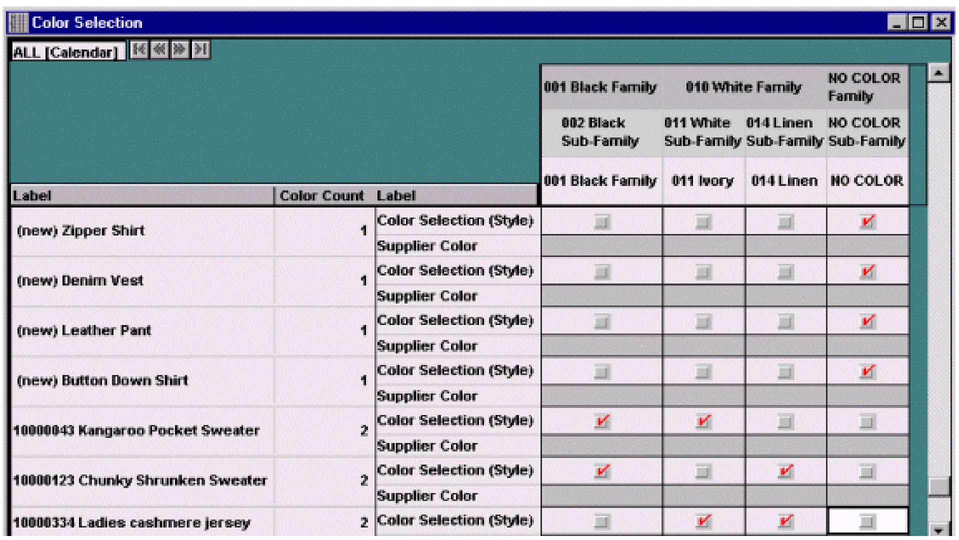
Color Selection Worksheet procedures

The following procedures are performed on the Color Selection Worksheet.

Select the Color Selection Worksheet

1 On the Workflow tabs, click **Plan Colors**.

2 Click on the Color Selection Worksheet.



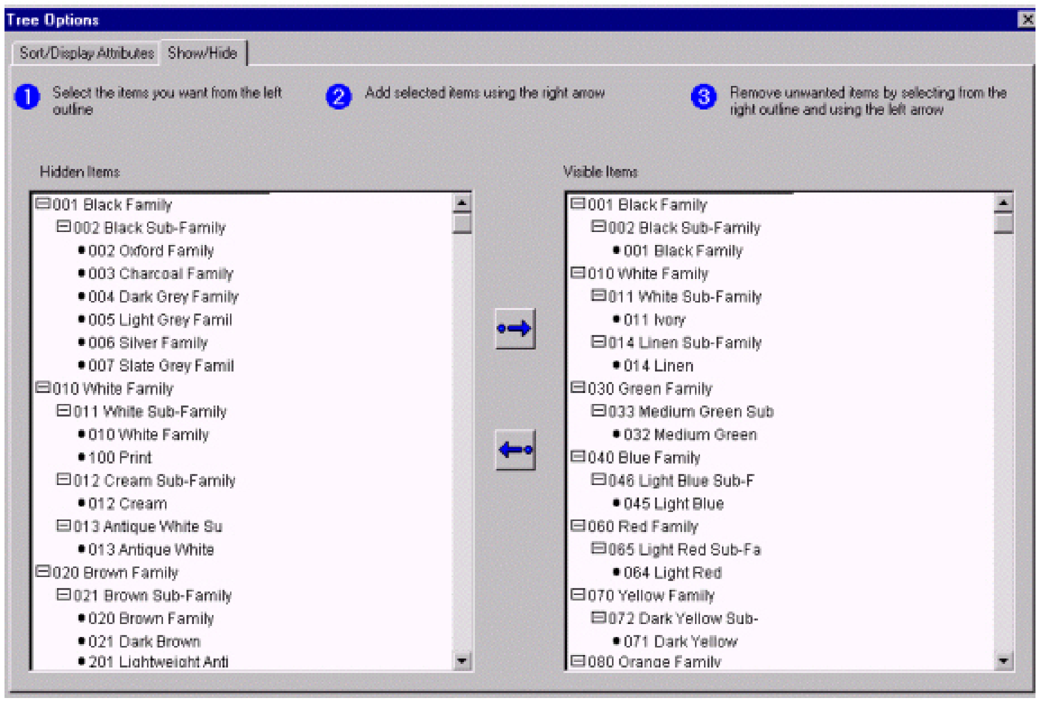
Color Selection Worksheet

For existing items, the previously selected colors will be checked. If new items were added to the assortment plan, the system automatically defaults to No Color.

Add/Remove colors for items

1 Right-click on any color or family color title. The Tree Options dialog is displayed.

2 Click on the **Show/Hide** tab. This tab displays two lists of items. The Hidden Items list contains all of the colors in the database. Colors may be selected by family or individually. All colors that you place in the Visible Items list can be applied to any item being planned in this assortment.



Show/Hide color selections

3 Click on a family color or individual color in the Hidden Items list. The selection is highlighted.

4 Click the right arrow to move the selection to the Visible Items list. That item is selected for the assortment.

5 Click **OK**. All selected colors are displayed across all items. Also, the Vendor color identifier can be displayed (if known).

Select Colors for Merchandise

1 On the Color Selection worksheet, to assign a color to an item, select the check box corresponding to that item and color. Remove the checkmark for undesired colors for an item.

Note: To remove the No Color check marks from multiple items, highlight the No Color column. Then select Edit > Fill from the main menu. Since check boxes are based upon a True/False condition; select False for the Fill Value. To assign colors to multiple items, highlight the items corresponding to the color, and then assign a True Fill Value.

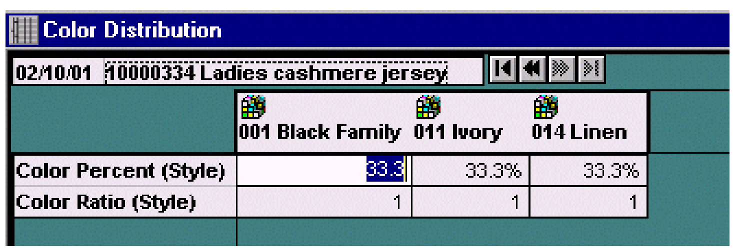
2 Click **Calculate**.

Color Distribution Worksheet procedures

The following procedures are performed on the Color Distribution Worksheet.

Select the Color Distribution Worksheet

1 Click on the Color Distribution Worksheet. The color selections made on the Color Selection Worksheet are distributed evenly for each item selected. For example, a selection of three colors for an item means that 33% of the quantity will be purchased in each color. As well, the Color Ratio will be evenly distributed with 1, 1, 1 ratio for each of the three colors that apply to the item.



Color Distribution Worksheet

Enter the % contribution or ratio of each color to the item

1 Near the top of the Color Distribution Worksheet are four arrow buttons. Click on either of the middle buttons,  and , to see the item list advance or retreat, item by item. Alternately, click the  button to move to the beginning or  to move the end of the item list.

> **Note:** It may be necessary to refresh the distribution displayed for an item if it does not correspond with the colors selected. Refresh an item display by clicking to the previous or next item in the list and then clicking back to the item.

2 Make any necessary adjustments to the color selections for each item by editing the Color Percent or Color Ratio.

3 Click **Calculate** after each item color modification is made. Assort causes the total distribution percentages to normalize to 100%.

Plan Sizes workflow tab

This step involves identifying the item size assortment and ratio of sizes for the item.

This process step involves the following procedures:

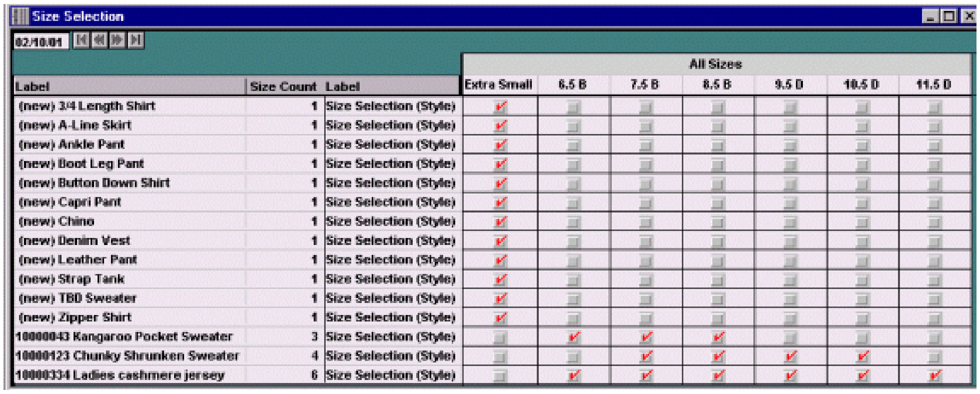
- Add/remove sizes for items
- View the Size Selection Worksheet
- Select sizes for merchandise
- Enter the % contribution of each size to the item

Size Selection Worksheet procedures

The following procedures are performed on the Size Selection Worksheet.

View the Size Selection Worksheet

1 Click on the Size Selection worksheet from the Plan Sizes workflow tab to make it the active window.



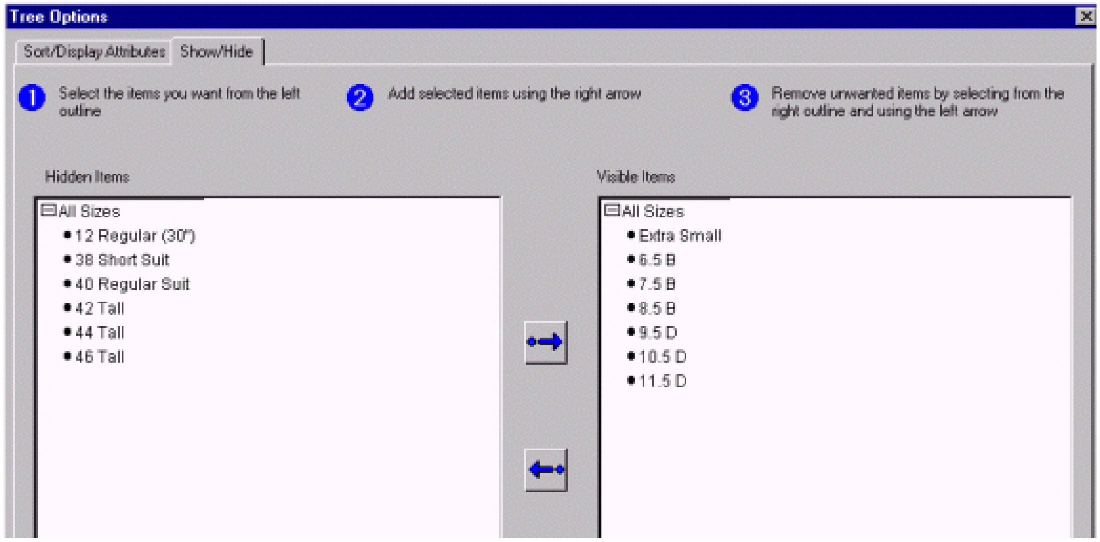
Size Selection Worksheet

2 For existing items, the previously selected sizes will be checked. If new items were added to the assortment plan, the system automatically defaults to Extra Small.

Add/remove sizes for items

1 Right-click on any size. The Tree Options dialog is displayed.

2 Click on the Show/Hide tab. This tab displays two lists of items. The Hidden Items list contains all of the sizes in the database. All sizes that you place in the Visible Items list can be applied to any item being planned in this assortment.



Show/Hide tab for size selections

3 Click on a size family or individual size in the Hidden Items list. The selection is highlighted.

4 Click the right arrow to move the selection to the Visible Items list. That item is selected for the assortment.

5 Click **OK**. All selected sizes are displayed across all items.

Select sizes for merchandise

1 On the Size Selection worksheet, to assign a size to an item, select the check box corresponding to that item and size. Select the check box for each size you wish to assign to an item.

Note: To remove the No Size check marks from the new item selections, highlight the No Size column. Next, select Edit > Fill from the main menu. Since check boxes are based upon a True/False condition, select False for the Fill Value. To assign sizes to multiple items, highlight the items corresponding to a size, then assign a True Fill Value.

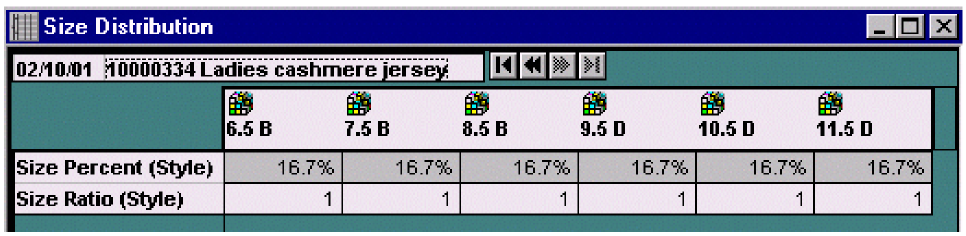
2 Click **Calculate**.

Size Distribution Worksheet procedures

The following procedures are performed on the Size Distribution Worksheet.

Enter the % contribution of each size to the item

1 Click on the **Size Distribution Worksheet**. On this worksheet, the size selections are distributed evenly for each item selected. For example, a selection of six sizes for an item means that 16.7% of the quantity will be purchased in each color. As well, the Color Ratio will be evenly distributed with 1, 1, 1, 1, 1 ratio for each of the five other sizes that apply to the item.



Size Distribution Worksheet

2 Near the top of the Size Distribution worksheet, locate four arrow buttons. Click on either of the middle buttons, and , to see the item list advance or retreat, item by item. Alternately, click the button to move to the beginning or to move the end of the item list.

Note: It may be necessary to refresh the distribution displayed for an item if it does not correspond with the sizes selected. Refresh an item display by clicking to the previous or next item in the list and then clicking back to the item.

3 Modify the distribution by changing the Size Ratio or Size Percent contribution of each of the sizes to the item. Click Calculate. Assort will automatically adjust the distribution percentages to equal 100%.

Chapter 7 – Validate and revise

In this step of the assortment planning process, you verify that all data entries have been entered correctly. Then, you view the color size distribution by item and the planned units across store grades. If appropriate, you modify the plan by deselecting items at the grade level.

This process step involves the Details and Plan Totals workflow tabs.

Details workflow tab

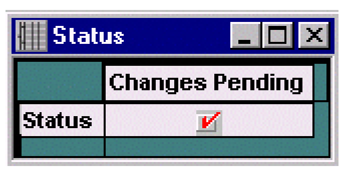
The following procedures are performed on the Details workflow tab.

View the Status Window

The Status Window indicates whether any calculations that would affect the assortment plan data are outstanding.

1 On the workflow tabs, click **Detail**.

2 View the Status window. If the Changes Pending check box is selected, clear the check box and select Calculate. The data displayed in all process windows is updated.



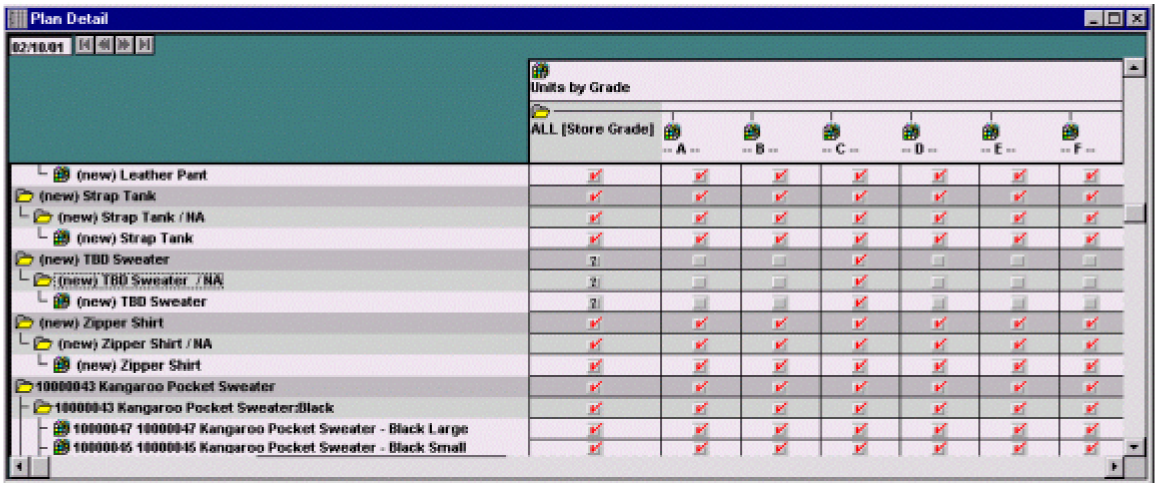
Status Window

If the Changes Pending check box is cleared, that means that there have been no changes tot he plan and that the Plan Detail information is accurate without having to calculate to update.

3 Proceed to the Plan Detail worksheet

Plan Detail Worksheet procedures

The Plan Detail Worksheet offers information on the buy to the lowest product level plan. After review, you may choose to clear products by grade. This is achieved by clearing the check box for products at each store grade.



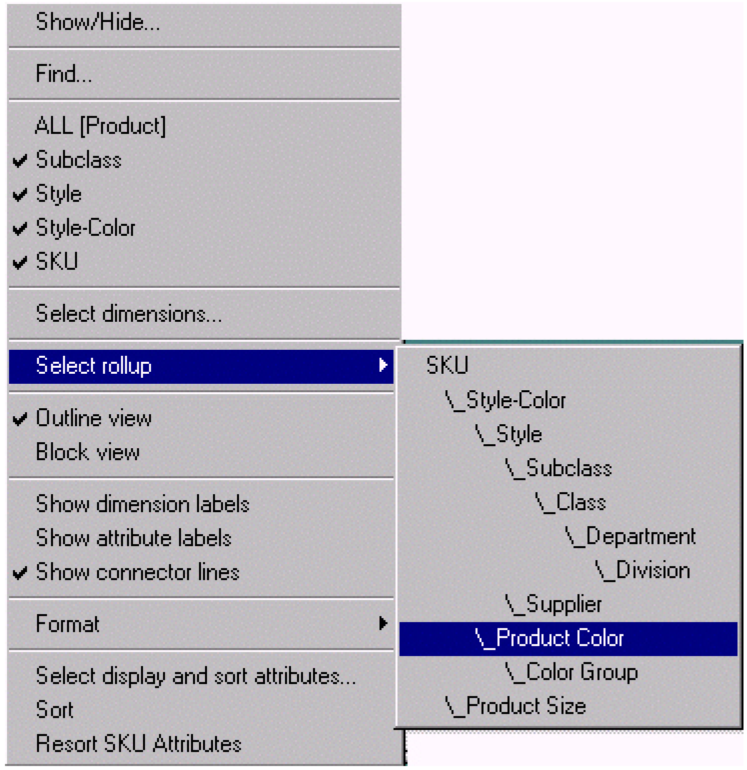
Plan Detail Worksheet

Select an alternate roll-up

You can view the assortment at any product detail level you choose, by choosing among the roll-up options.

1 On the Plan Detail worksheet, right-click on any product, and select Select roll-up from the quick menu.

2 Choose one of the roll-up options. You can choose to review merchandise information at any level in the product hierarchy for example, assortment totals by supplier, by color, or by size.



Select rollup quick-menu option

Review the plan

1 Use the scroll bar located along the bottom of the worksheet to review the plan based on several performance indicators.

Deselect items by store grade

Once the plan is reviewed, you may wish to eliminate an item or items at the grade level. To do this, clear the check box at the appropriate item/grade level. Once the check box is cleared, click **Calculate** and review the changes.

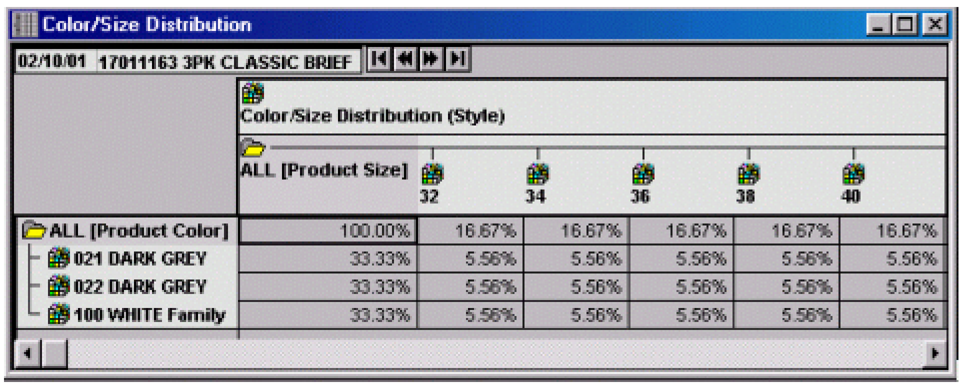
Color/Size Distribution Worksheet procedures

The Color/Size Distribution Worksheet displays a composite size and color distribution.

Review color/size distribution

The Color/Size Distribution Worksheet displays the color and size percentage distribution for each item. It presents color on one axis and size on another.

This worksheet is provided primarily for informational purposes. Values on the Color/Size Distribution Worksheet are read-only. You can use this worksheet alongside the information on the Plan Detail Worksheet to see the composite size/color distribution. Low percentages on this window indicate areas where your assortment is being spread too thin.



Color/Size Distribution window

1 Review the data on the Color/Size Distribution window.

2 If necessary, change the entries made in the Plan Colors and Plan Sizes workflow tabs.

Plan Totals workflow tab

The following procedures are performed on the Details workflow tab.

View the Plan Totals Worksheet

The Plan Totals Worksheet displays total values for the assortment plan. You can manipulate the view and level of detail displayed in this window. For example, you can roll up to a desired level, view aggregate levels, or view individual levels of style-color.

	All Store Planned Units	All Store Planned Retail	All Store Cost
ALL [Product]	30,200	$900,000	$333,050
10 CHARCOAL	5,000	$175,050	$64,813
(new) New 2 button polo / 10 CHARCOAL	1,150	$28,750	$9,775
(new) New 2 button polo / 10 CHARCOAL / LARGE	375	$9,375	$3,188
(new) New 2 button polo / 10 CHARCOAL / MEDIUM	575	$14,375	$4,888
(new) New 2 button polo / 10 CHARCOAL / X LARGE	200	$5,000	$1,700
(new) pigment dyed woven / 10 CHARCOAL	2,100	$58,800	$24,150
(new) pigment dyed woven / 10 CHARCOAL / LARGE	700	$19,600	$8,050
(new) pigment dyed woven / 10 CHARCOAL / MEDIUM	700	$19,600	$8,050
(new) pigment dyed woven / 10 CHARCOAL / X LARGE	700	$19,600	$8,050
73858148 CARGO PANT / 10 CHARCOAL	1,750	$87,500	$30,888
73858148 CARGO PANT / 10 CHARCOAL / LARGE	600	$30,000	$10,590
73858148 CARGO PANT / 10 CHARCOAL / MEDIUM	275	$13,750	$4,854
73858148 CARGO PANT / 10 CHARCOAL / X LARGE	600	$30,000	$10,590
73858148 CARGO PANT / 10 CHARCOAL / XX LARGE	275	$13,750	$4,854
262 MED BEIGE	9,350	$281,200	$105,538
(new) New 2 button polo / 262 MED BEIGE	2,300	$57,500	$19,550
(new) New 2 button polo / 262 MED BEIGE / LARGE	775	$19,375	$6,588
(new) New 2 button polo / 262 MED BEIGE / MEDIUM	1,150	$28,750	$9,775
(new) New 2 button polo / 262 MED BEIGE / X LARGE	375	$9,375	$3,188

Plan Totals Worksheet

1 Review Color/Size details at the All Store level.

2 Changes should be made at the Plan Item Across Grade or the Plan Sizes or Plan Colors workflow tabs.

Plan vs. Targets Worksheet

The Plan vs. Targets Worksheet displays the final plan variance to target information. The purpose of this worksheet is to provide a composite view of the final plan in comparison to the financial and capacity constraint components. All measures are read-only. If changes are to be made, they must be done so in the appropriate worksheet.

Final Plan variance to target information

	ALL [Store Grade]	-- A --	-- B --	-- C --	-- D --
Per Store Target Units (R/O)	151	199	166	133	106
Per Store Units (Style) (R/O)	158	218	164	138	110
% variance to Target (Style)	0%	0%	0%	0%	0%
Per Store Target Retail (R/O)	$4,530	$5,970	$4,980	$3,990	$3,180
Per Store Retail (Style) (R/O)	$4,645	$6,266	$4,930	$4,164	$3,218
% variance to Retail Target (Style)	0%	0%	0%	0%	0%
All Store Target Retail (R/O)	$876,750	$149,250	$249,000	$399,000	$79,500
All Store Retail (Style) (R/O)	$900,000	$156,650	$246,500	$416,400	$80,450
Per Store Capacity Units Max	1080	408	264	204	204
Per Store Capacity Units Min	544	208	128	104	104
% variance to Capacity (max) (Style)	71%	5%	28%	33%	6%

Plan vs. Targets Worksheet

1 On the Plan vs. Targets Worksheet, review plan variances, paying particular attention to the targets. Values on this worksheet are read-only. Changes to values must be made on the worksheets used in previous steps in the assortment planning process.

Commit the plan for reporting (optional)

Assortment planning is a collaborative process. All users involved in assortment planning should review the current assortment plan and determine whether it is viable to meet the business goals set forth in the corporate planning process. As the product development evolves and the planning cycle progresses, the assortment plan remains a working document. You can collaborate internally among users to review the plan against target data. You can also collaborate externally among trading partners to review the plan against target data.

Before a plan can be used to build a report, it must be committed to the database. This process makes the plan available for other users who have permission to open your corporate database.

1 On the toolbar, click **Close**.

2 Choose Commit Now, Save and Commit Now, or Save and Commit Later. For descriptions of these options, see on page 9.

Chapter 8 – View and modify assortment plan reports

As needed, you can run reports about your assortment plan data. This chapter describes Assort's reporting capabilities. It includes the following topics and procedures:

- About assortment reports
- Set up reports
- Modifying the display of hierarchy data
- Switch between grid and chart views
- Create a new report

About assortment reports

The Assort report function allows you to compile and view data across several assortment plans. All reports are generated in the reporting workbook. The Assortment Plan Report Wizard creates the report from the information specified in the steps of the wizard process. This series of wizard steps defines the plan content of the report. A standard set of measures supports the reporting. Those measures include: All Store Planned Retail, All Store Planned Units, All Store Planned Cost, % of Product, % of Product Retail, % Size, % Color, % Grade, and % Grade Retail.

Note: The report-generation functionality is very powerful. The data view presented in the reports can be modified. It is not fully documented in this user guide. For further information, refer to the Retek Predictive Application Server User Guide or online help.

Set up reports

1 On the toolbar, click **New**. The New window is displayed. Click the Assortment Planning tab.

2 On the Assortment Planning tab, select Assortment Plan Report and click **OK**.

3 The first wizard step appears, requiring the selection of the report consolidation level from the product hierarchy. You may choose one of the following levels: Division, Department, Class, Subclass, or Style. After choosing a level, click **Next**.

4 The next wizard presents the product hierarchy at the level chosen in the previous step. From this hierarchy, you then select the product on which you wish to report. The product selection is made by pressing the right arrow to move the product over to the right side of the wizard. Click **next** to move to the next wizard step.

5 Select the highest level of assortment plan on which you wish to report. The choices are: Department, Class, or Subclass. Multiple choices are allowed. Click **Next**.

6 The next wizard question concerns the type of assortments that you wish to report upon. There are three choices: Sales, Inventory, and Receipts. Select as many of these choices as you desire. Click **Next**.

7 Select the phases or phases for which you want to generate reports. Click **Next**.

8 Select the store grades for which you want to generate reports. Click **Next**.

9 In a previous wizard, you established reporting criteria. Assortment plans that meet that reporting criteria are presented in a list.

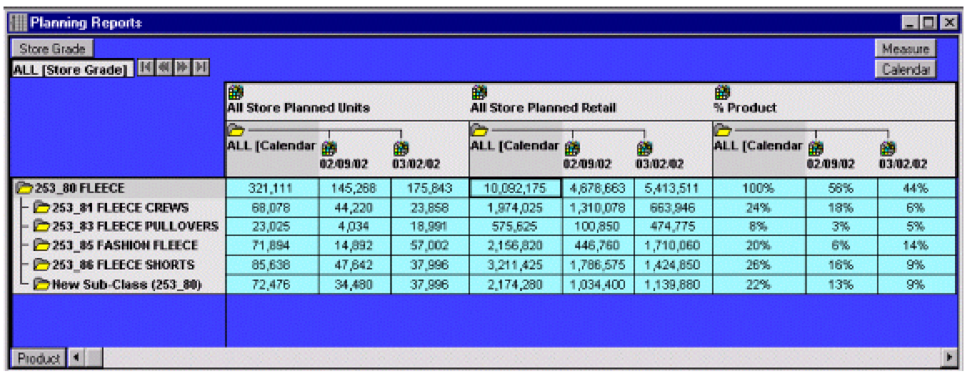
a. From the list of assortment plans, select one or more to include in the report that you are creating.

b. Click **Finish**. The assortment plan report is built, and the report is displayed.

Modifying the display of hierarchy data

Within a report, plan data is viewed in specific viewing dimensions. The dimensional hierarchies are Calendar Product, Measure, and Store Grade. The four buttons, or hierarchy tiles, shown at the upper-left, upper-right, and lower-left corners of the window, indicate these viewing hierarchy dimensions.

The arrangement of these hierarchy tiles determines how information is displayed on the report. Product data is shown along the vertical axis of the report, while measure and plan date information is shown on the vertical axis. The view advances through the same plan by store grades when you use the back and forward arrows below the Store Grade hierarchy tile.



Hierarchy tiles in a report

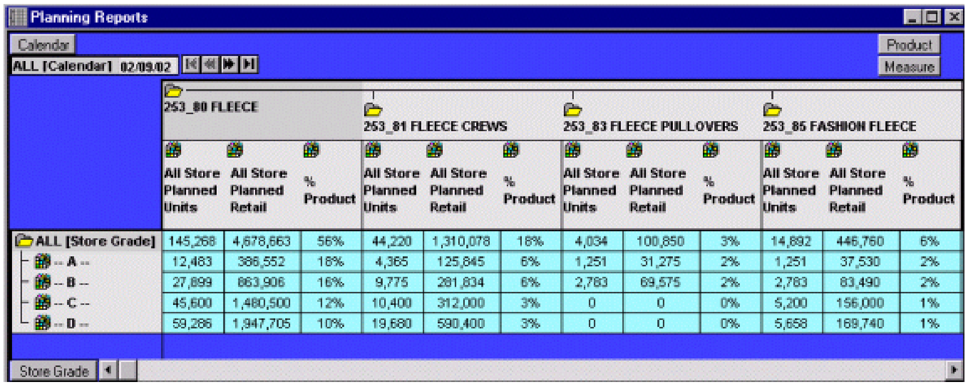
You can manipulate the view of report data by moving the hierarchy tiles between the three axis positions on the report: the slice display area, the column display area, and the row display area.

- The upper left corner of the report is the slice display area. Data displayed in the slice display area is displayed one slice or page at a time. A hierarchy tile placed here controls what is displayed in the slice control just below the tile. For example, if Store Grade were displayed here, clicking the forward and backward buttons would display the various store grades in the report. More than one tile can be placed in this display area, which means that the slice control is further qualified by the hierarchy tile placed before it.

- The upper-right corner of the report is the column display area. A hierarchy tile placed here controls what is displayed in the column axis of the report. More than one tile can be placed in this display area. For example, the Measure and Calendar tiles are placed in the above report’s column display area, which means that the column axis displays measures by calendar date.

- The lower-left corner of the report is the row display area. A hierarchy tile placed here controls what is displayed in the row axis of the report. More than one tile can be placed in this display area. In the example, the Product hierarchy tile is placed in the row display area, which means the row axis of the report displays data by product.

In the example below, using the same report, the Calendar hierarchy tile was moved into the slice display area, the Store Grade tile to the row display area, and the Product tile to the column display area. Note how the display of report data changes.



	253_80 FLEECE			253_81 FLEECE CREWS			253_83 FLEECE PULLOVERS			253_85 FASHION FLEECE		
	All Store Planned Units	All Store Planned Retail	% Product	All Store Planned Units	All Store Planned Retail	% Product	All Store Planned Units	All Store Planned Retail	% Product	All Store Planned Units	All Store Planned Retail	% Product
ALL [Store Grade]	145,268	4,678,663	56%	44,220	1,310,078	18%	4,034	100,850	3%	14,892	446,760	6%
-- A --	12,483	386,552	18%	4,365	125,845	6%	1,251	31,275	2%	1,251	37,530	2%
-- B --	27,899	863,906	16%	9,775	281,834	6%	2,783	69,575	2%	2,783	83,490	2%
-- C --	45,600	1,480,500	12%	10,400	312,000	3%	0	0	0%	5,200	156,000	1%
-- D --	59,286	1,947,705	10%	19,680	590,400	3%	0	0	0%	5,658	169,740	1%

Changing the view by rearranging hierarchy tiles

For more information on hierarchy tiles and changing the view of data, see the Retek Predictive Application Server User Guide or online help.

Switch between grid and chart views

You can display report data in grid or chart form. You can also modify the data by moving the hierarchy tiles. To switch between views of report data, follow these steps:

1. On the menu bar, select View > Graph or View > Chart. Or, click **Toggle** on the toolbar.
2. Drag and drop the hierarchy tiles until you achieve the data presentation desired.

For more information on formatting the grid or chart view of data, see the Retek Predictive Application Server User Guide or online help.

Create a new report

1. On the Menu bar, select Window > New Window. A window is displayed asking for a title for the report.
2. Enter a title, and click **OK**. A new window is displayed, showing the format of the previously active window.
3. Modify the window as needed.

Chapter 9 – System administration and setup

The system administration and setup step of the Assort business process involves the following tasks:

- Set up user accounts
- Set up access to the Assort application
- Install Assort software on users' PCs
- Set up phases used throughout assortment plans
- Set up fixtures
- Set up corporate percent of stores
- Load reference data into the Assort database

Set up user accounts

In this step of the Assort business process, you assign passwords to other administrator users and to those who create or view both Assortment plans and Assortment reports.

Authority levels differ for Administrators and Users.

Administrators can:

- Access the Administration Console
- Perform Assort user setup functions
- Set up reference data: corporate fixtures, phases, and corporate percent of stores
- Load reference data

Users can:

- Access the User Console
- Create, edit, and view assortment plans
- Create or view assortment reports
- Add administrators
- Edit administrators
- Delete administrators
- Add users
- Edit users
- Delete users

Assort User Administration Window

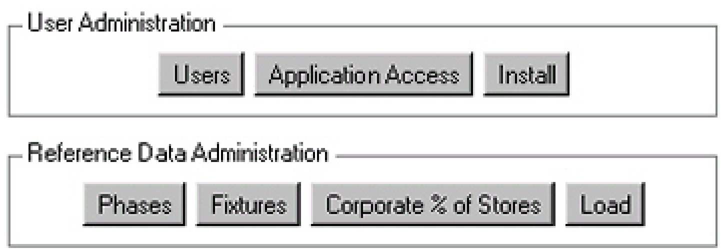
User administration involves the User Administration window, and the following tabs:

Tab Name	Tab Description
Administrator tab	Displays a list of the people who are assigned as Administrators. Used for adding, deleting, and editing administrator information.
Users tab	Displays a list of assigned users. Used for adding, deleting, and editing user information.
Users tab - Details	Displays the fields where administrator and user information is entered.
Users tab - Scope	An entry is required in the Selected Departments list. Assort accepts any department name moved to the selected list.
Users tab - Permissions	Your company's retail.com e-service subscriptions are listed in the Service column. Access to certain areas of Assort is assigned to individual users on this tab.

Add administrators

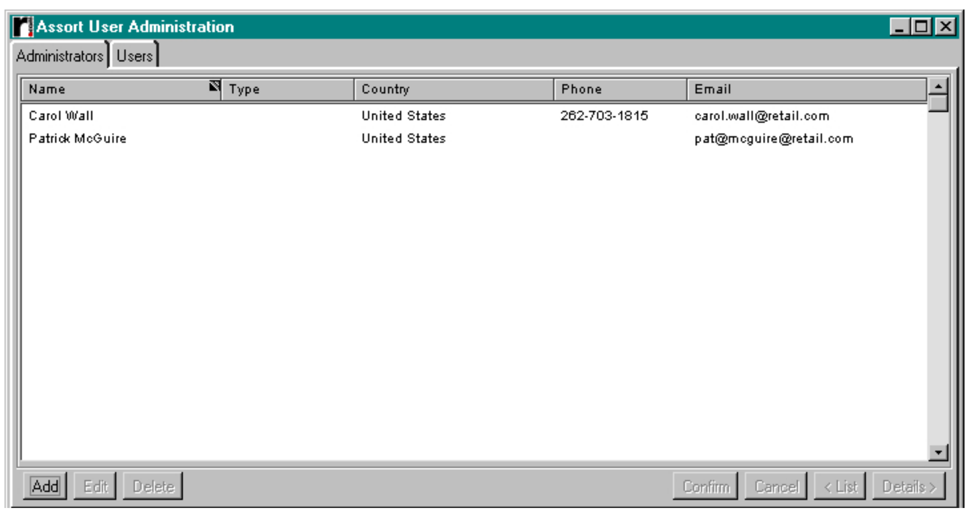
1 Log in to www.retail.com as the enterprise administrator. Click **WebTrack** to access the Administration Console.

2 On the Administration Console, click **Users**.



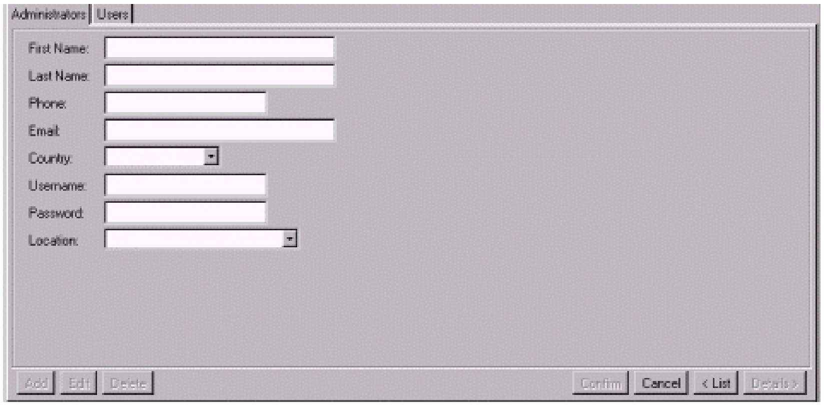
Administration Console

The User Administration window is displayed, showing a list of administrators on the Administrator tab.



Assort User Administration – Administrators tab

3 Click **Add**. The entry fields for adding an Administrator are displayed and enabled.



Assort Administrator account fields

4 Enter information in the required fields, and in other fields if desired.

Field Name	Field Description
First Name	The first name of the administrator. This field is required.
Last Name	The last name of the administrator. This field is required.
Phone	The phone number of the administrator.
Email	The e-mail address of the administrator. This e-mail address is used with the mail messaging systems throughout Assort. This field is required.
Country	The country where the administrator is located.
Username	The username that the administrator enters to log in. This field is required.
Password	The password a user enters to log in. This field is required.
Location	The business unit location of the administrator.

5 Click **Confirm**. This administrator's name is displayed in the list on the left. This administrator can now log on to the Administration Console with the designated username, password, and Enterprise code.

Note: Confirm is not enabled until all required entries are made.

Edit administrators

1 On the Assort User Administration window - Administrators tab, select the name of an administrator in the list.

2 Click **Edit**. The administrator's details are displayed. The entry fields are enabled.

3 Select the fields you wish to modify, and change the information.

4 Click **Confirm** to save the changes.

Delete administrators

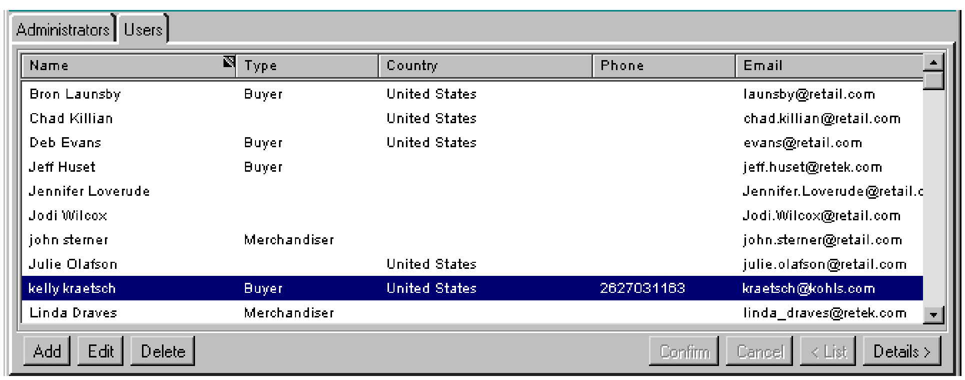
1 On the Assort User Administration window - Administrators tab, select the name of an administrator in the list.

2 Click **Delete**. A dialog box is displayed to confirm your decision.

3 To proceed, click **OK**. The administrator's name is deleted from the list.

Add users

1 On the Assort User Administration window, click the Users tab. The User list is displayed.



Assort User Administration – Users tab

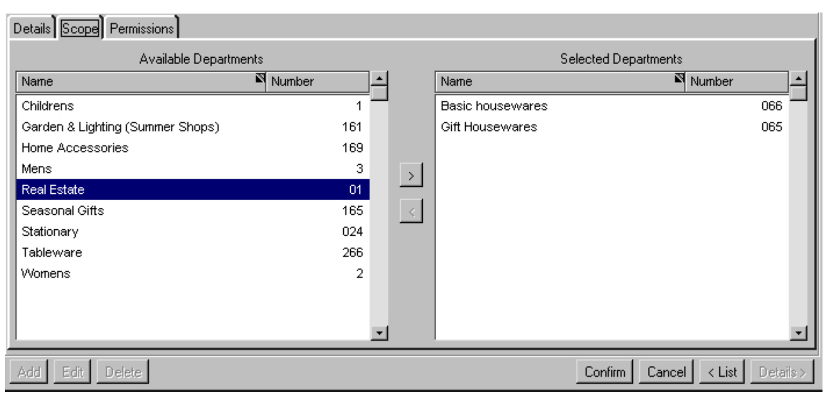
2 Click **Add**. The Details tab is displayed, with the entry fields enabled. Other tabs displayed are the Scope and Permissions tabs.

3 On the Details tab, enter information about the new user in the required fields, and in the other fields, if desired.

Field Name	Field Description
First Name	The first name of the user. This field is required.
Last Name	The last name of the user. This field is required.
Type	The user's role in your Enterprise. Options in this drop-down list are created by retail.com.
Phone	The phone number of the user.
Email	The e-mail address of the user. This field is required.
Country	The country where the user is located.
Username	The username that the user enters to log in. This field is required.
Password	The password that the user enters to log in. This field is required.
Account Manager	Not used in Assort.
Review Only	Not used in Assort.
Location	The business unit location of the user.

4 Click on the Scope tab. The scope window is displayed. It shows a list of available departments and a list of selected departments.

Note: While selecting a department for a user is required, this information is not used for Assort in this release.



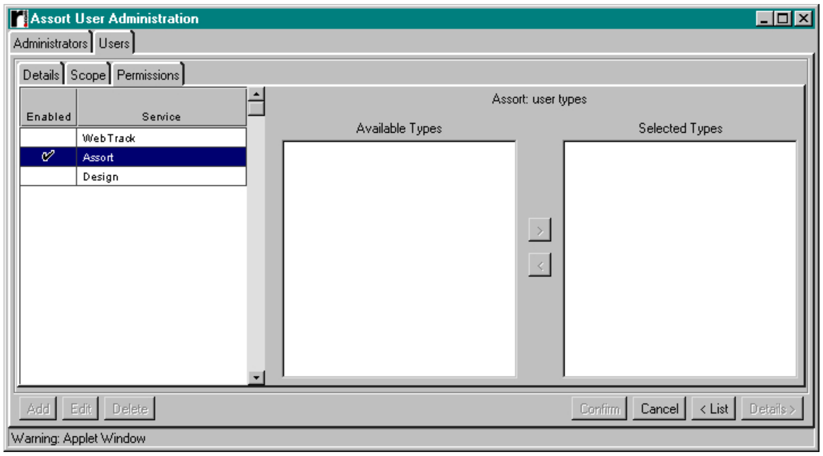
Assort User Administration – Scope tab

5 Select any department in the Available Departments list.

6 Click the right arrow button between the two lists. The selected department is moved to the Selected Departments list.

7 Click **Confirm** to save the Scope information entry.

8 Click on the Permissions tab to display the Permissions tab for user administration. The Permissions tab sets user access permissions to various retail.com products.



Assort User Administration – Permissions tab

9 Click the Enabled column and select Assort in the Service column. This user can now log in to Assort.

10 Click **Confirm** to save the user information.

Note: Confirm is not enabled until there are entries in all required fields.

Edit user information

1 On the Assort User Administration window–Users tab, select the user name to edit.

2 Click **Edit**. The user's details are displayed with the entry fields enabled.

3 Change the information in any or all of the entry fields.

4 Click **Confirm** to save the information to the database.

Delete users

1 On the Assort User Administration window–Users tab, select the user name to delete.

2 Click **Delete**. A dialog box is displayed to confirm your decision.

3 To proceed, click **OK**. The selected user name is deleted.

4 Click **List** to return to the list of users on the Users tab. The deleted user name is cleared from the list.

Set up application access

In this procedure, access to the Assort application is granted to a user.

1 On the User Administration Console, click **Application Access**. The User Setup window is displayed, showing a list of users.

User Setup Window

2 Select the name of the user. As needed, use the scrollbar to the right of the user list to locate the desired user name.

3 Click **Add**. This grants the user the ability to access Assort.

4 Click **Close** to close the window.

Install Assort software on users' PCs

A one-time installation of Assort must be performed on each user's PC.

1 Go to the user's PC, and log in to Assort as an Administrator.

2 On the User Administration Console, click **Install**. Text describing the Install procedure is displayed.

3 Read this information carefully and click **Install** to continue.

4 Follow the directions in the Installation window.

Set up phases

A phase is the time period planned by an Assortment plan. A phase is identified by a name, description, start, and end dates. Assort assigns an identification number to a phase.

An assortment planner chooses from a list of corporate defined phases or chooses to enter a custom phase.

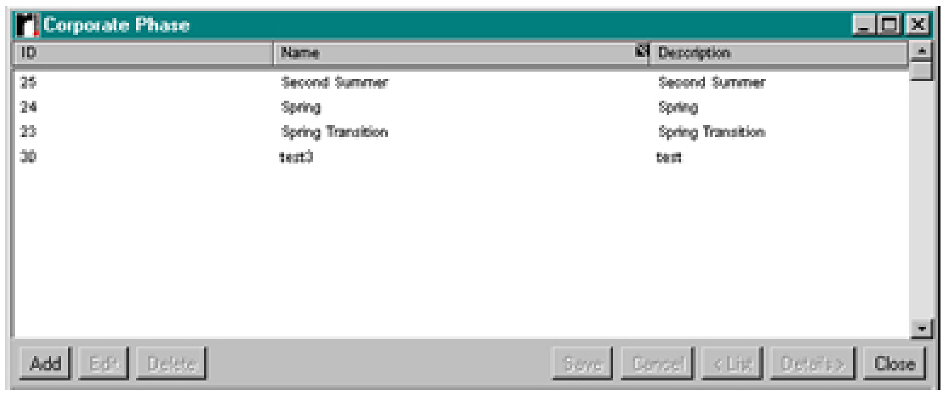
This process builds corporate phases, and involves the following procedures:

- Add a phase
- View phase details
- Edit a phase
- Delete a phase

Procedures

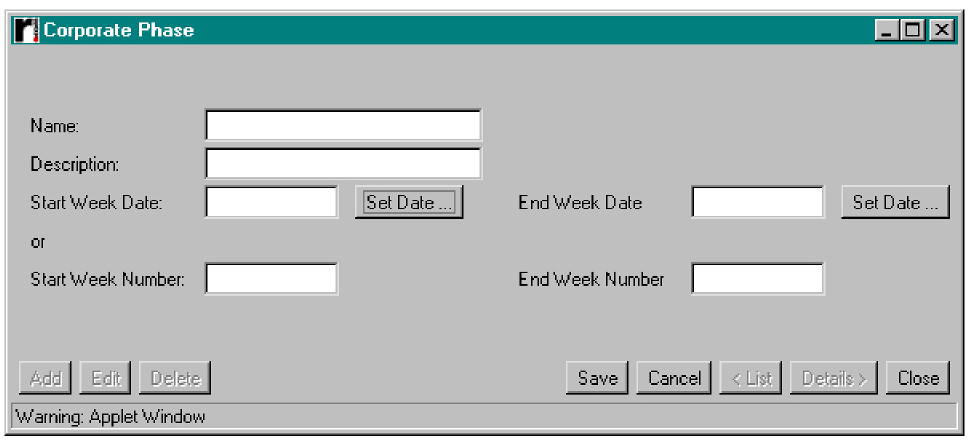
Add a phase

1 On the Reference Data Administration console, click **Phases**. A list of phases is displayed.



Corporate Phase window – list of phases

2 Click **Add**. The Corporate Phase window is displayed with all the phase-defining fields.



Corporate Phase Window – Add Corporate Phase fields

3 Enter a name for the phase.

4 Enter a description for the phase.

5 Use one of the following procedures to enter phase start and end dates. When dates are entered using either method, all fields are populated.

Enter phase dates using week numbers

1 On the Corporate Phase window, enter the week numbers (in the format of ww/yyyy) in the Start and End Week fields.

2 Click **Calculate**. All week and date fields are populated.

3 Click **Save**. A list of phases is displayed, showing the new phase with the identification number assigned by Assort.

Enter phase dates using calendar dates

1 On the Corporate Phase window, click **Set Date** for the Start Date field. A calendar is displayed.

2 In the calendar, click the left and right arrows until the month is displayed.

3 Click on the date. The calendar clears and a date is displayed, which will always be the first day of a calendar week.

4 Enter a date in the End Date field.

5 Click **Calculate**. All week and date fields are populated.

6 Click **Save**. A list of phases is displayed, showing the new phase with the identification number assigned by Assort.

View phase details

1 On the Reference Data Administration console, click **Phases**. A list of phases is displayed.

2 Click on the name of the phase to view. The line is highlighted.

3 Click **Details**. The defining fields are displayed.

4 Click **Close** or choose the next operation.

Edit a phase

1 On the Reference Data Administration console, click **Phases**. A list of phases is displayed.

2 Click the name of the phase to modify. The line is highlighted.

3 Click **Edit**.

4 Modify the necessary fields.

5 Click **Save**. The list of phases is displayed, showing the modified phase with an identification number that is defined by the system.

Delete a phase

1 On the Reference Data Administration console, click **Phases**. A list of phases is displayed.

2 Click the name of the phase you wish to delete. The line is highlighted.

3 Click **Delete**. A window is displayed asking you to confirm your decision, or a message alerts you to a phase description is used in another assortment plan.

4 If you wish to proceed, click **OK**. The phase is deleted.

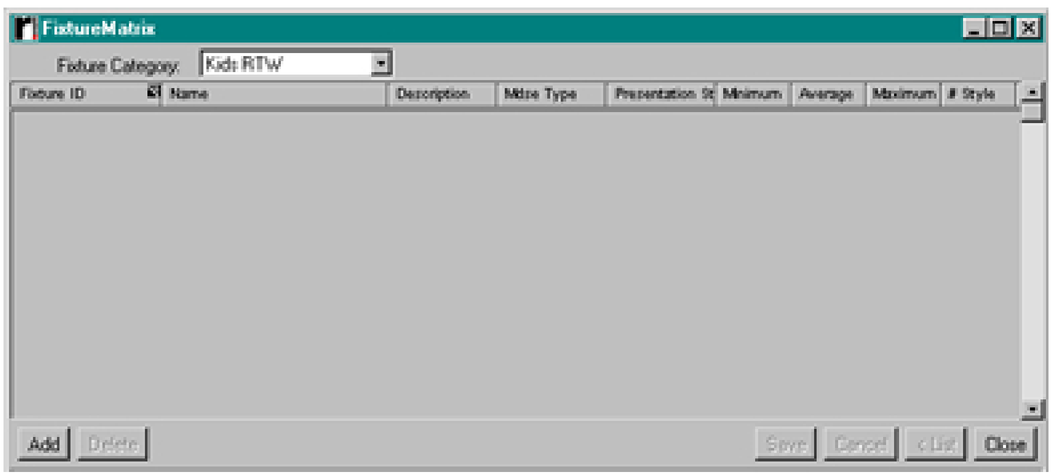
Set up fixtures

A fixtures list is defined in this process. You choose fixtures from this list, but you may also add new fixtures. This process involves the following procedures:

- View the fixture matrix
- Add a fixture to the fixture matrix
- Edit fixture detail
- Delete a fixture from the fixture matrix

View the fixture matrix

1 On the Assort Administration console's Reference Data Administration section, click **Fixture**. The Fixture Matrix window is displayed.



Fixture Matrix Window – Fixture list

2 In the Fixture Category field, click the drop-down arrow to select a specific category to view.

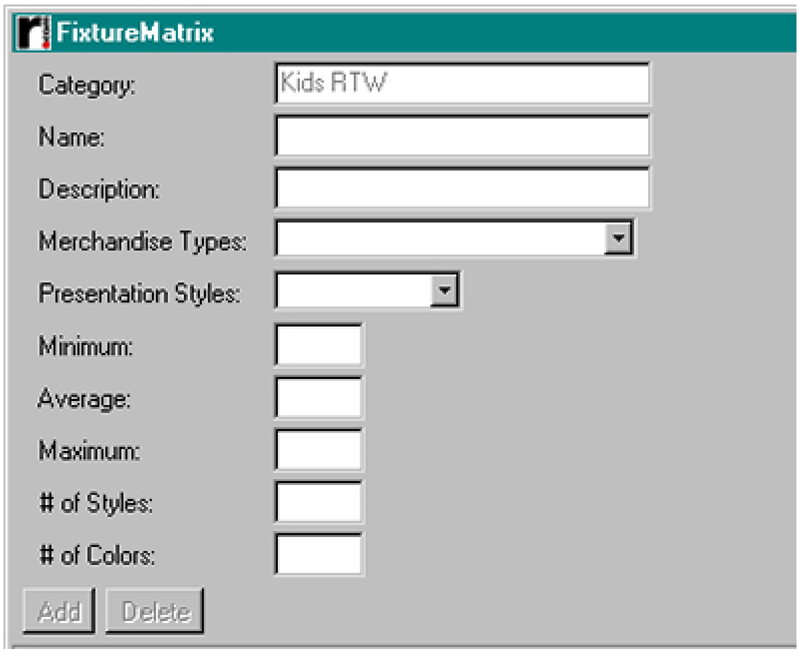
3 When finished viewing the fixture list, click **Close** to exit.

Add a fixture to the fixture matrix

1 On the Assort Administration console's Reference Data Administration section, click **Fixture**. The Fixture Matrix window is displayed.

2 In the Fixture Category field, click the drop-down arrow to select a specific category.

3 Click **Add**. A window is displayed. The fields to define a fixture are enabled.



Fixture Matrix Window – Add Fixture Matrix fields

4 Enter the requested information in each field.

5 Click **Save**. The fixture is added to the category list.

6 Click **Close** to exit this procedure.

Edit fixture detail

1. On the Assort Administration console's Reference Data Administration section, click **Fixture**. The Fixture Matrix window is displayed.

2. Double-click the field you want to edit. A window defining fixture fields is enabled. Modify the information and press Enter.

   Note: The Enter key must be pressed to capture the changes.

3. Click **Save**.

4. Click **Close** to exit this procedure.

Delete a fixture from the fixture matrix

1. On the Assort Administration console's Reference Data Administration section, click **Fixture**. The Fixture Matrix window is displayed.

2. Click the fixture line you want to delete. The line is highlighted.

3. Click **Delete**. A window is displayed which asks you to confirm the deletion.

4. Click **OK** to confirm. The line item is deleted.

5. Click **Close** to exit this procedure.

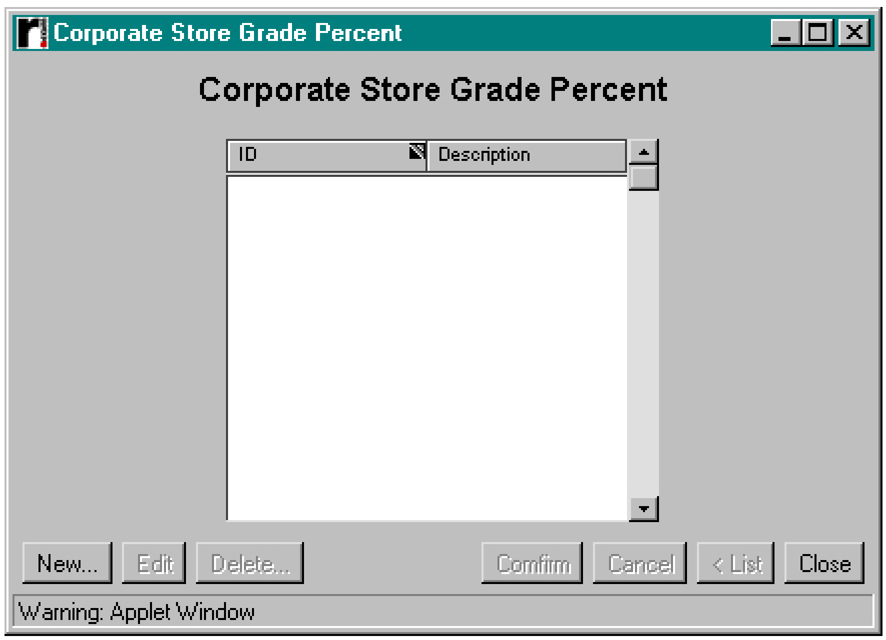
Set up corporate percent of stores

The Corporate Percent of Stores entry identifies the number of store grades and the percent of stores to be assigned to each store grade. This process step involves the following procedures:

- Add a corporate percent of stores
- View or edit a corporate percent of stores
- Delete a corporate percent of stores

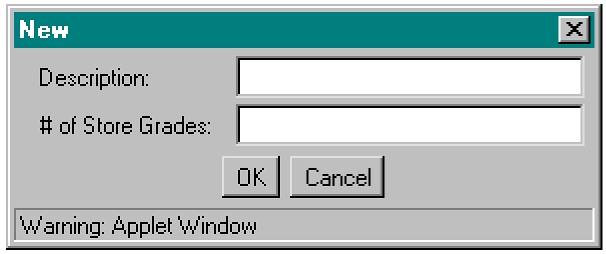
Add a corporate percent of stores

1 On the Reference Data Administration console, click **Corporate % of Stores**. A list of Percent of Stores is displayed in the Description column. The ID column contains a system identification number assigned by Assort.



Corporate Store Grade Percent Window

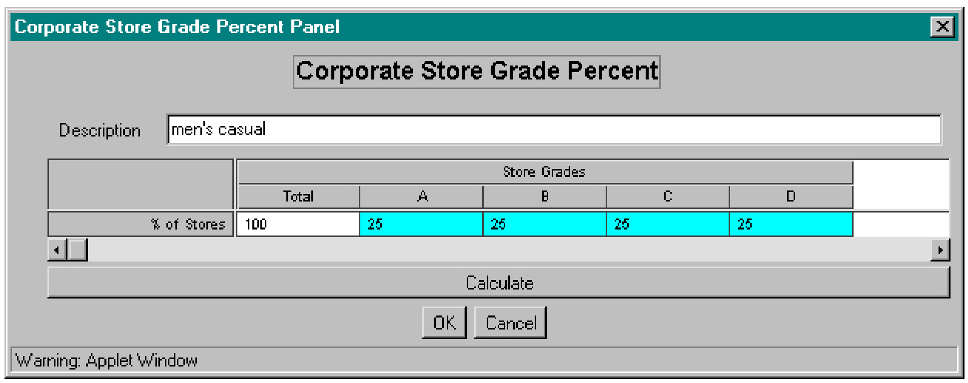
2 Click **New**. The New dialog is displayed.



New Corporate Store Grad Percent dialog

3 Enter the Description and the # of Store Grades.

4 Click **OK**. The Corporate Store Grade Percent Panel is displayed showing the store grade alpha names and a percent for each store grade.



Corporate Store Grade Percent Panel

5 To modify the percent, double-click the Percent field.

6 Enter a new percent, and press the Enter key.

7 Click **Calculate** to calculate the total percent.

8 Click **OK** to save the entry. If the total of percents is not 100, an error message is displayed. Correct this error, and click **OK** again.

9 Click **Close** to exit this procedure.

View or edit percent of stores

1. On the Reference Data Administration console, click **Corporate % of Stores**. A list of Percent of Stores Indexes is displayed.

2. Click the name of a Percent of Stores entry. The line is highlighted and the **Edit** and **Delete** buttons are enabled.

3. Click **Edit**.

4. To modify the percent, double-click the percent field

5. Enter a new percent, and press Enter. Click **Calculate** to calculate the total percent.

6. Click **OK** to save the entry. If the total percent is not 100, an error message is displayed. Correct this error, and click **OK** again.

7. Click **Close** to exit this procedure.

Delete a Percent of Stores

1. On the Reference Data Administration console, click **Corporate % of Stores**. The list of Percent of Stores is displayed.

2. Click the name of the Percent of Stores to delete. The description name is highlighted.

3. Click **Delete**. A window displays asking you to confirm your decision.

4. To proceed, click **OK**. The Percent of Stores is deleted from the list.

5. Click **Close** to exit this procedure.

Load reference data

After the Fixtures, Phases, and Percent of Stores procedures are completed, clicking **Load** on the Reference Data Administration console sends the information to the Assort database on retail.com. This process is instantaneous. The information is displayed in various windows throughout the assortment plan steps.

1. On the Reference Data Administration console, click **Load**. The Data Load Monitor window opens to display progress of the load operation.

2. Click **OK**. The information has been transferred.

Note: If any data is added, edited, or deleted in the reference data procedures, the Load procedure must be repeated.

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